BizIntuit

STREAMLINING THE BUSINESS PROCESS

MODULE

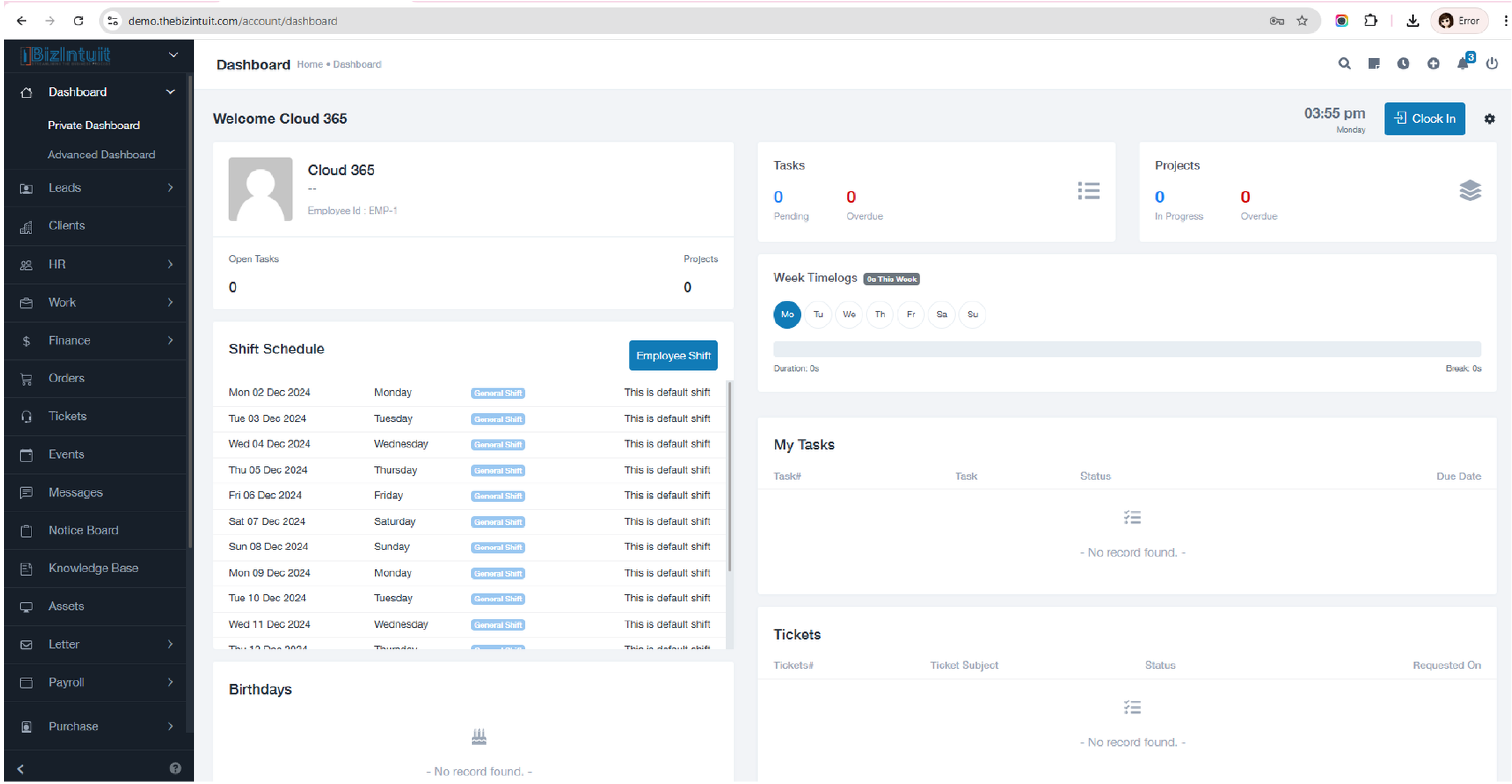
- Dashboard
  - Private Dashboard
  - Advanced Dashboard
- Leads Management
  - Leads Contacts Manage
  - Deals Manage
- Client Management
- HR Management
  - Employee Management
  - Leaves Management
  - Attendance Management
  - Holiday
  - Designation Management
  - Department Manage
  - Appreciation manage
- Work Management
  - Contracts Manage
  - Projects Manage
  - Tasks Manage
  - Timesheet manage
  - Project Roadmap
- Finance Managements
  - Proposal
  - Estimates
  - Invoices
  - Payments
  - Credit Note
  - Expenses
  - Bank Account
  - E-Invoice
- Order Managements
- Tickets Managements
- Events Managements
- Message Management
- Notice Board
- Knowledge Base
- Assets
- Letter
  - Generate Letter
  - Template Generate
- Payroll Management
  - Payroll
  - Employee Salary
  - Reports
- Purchase Management
  - Vendor
  - Products
  - Purchase
  - Order Bills
  - Vendor
  - Payments
  - Vendor
  - Credits
  - Inventory
  - Reports
- QR Code
- Recruit
  - Dashboard
  - Job
  - Job Applications
  - Interview Schedule
  - Offer Letters
  - Skills
  - Candidate Database
  - Reports
  - Career Site
- Report
  - Task Report
  - Time Log
  - Report Finance
  - Report Income Vs Expense
  - Leave Report
  - Attendance Report
  - Expense Report
  - Deal Report
  - Sales Report
- Zoom Meetings

Settings

- Company Settings
- Business Address
- App Settings
- Profile Settings
- Notification Settings
- Currency Settings
- Payment Credentials
- Finance Settings
- Contract Settings
- Tax Settings
- Ticket Settings
- Project Settings
- Attendance Settings
- Leaves Settings
- Custom Fields
- Roles & Permissions
- Message Settings
- Lead Settings
- Time Log Settings
- Task Settings
- Security Settings
- Theme Settings
- Module Settings
- Google Calendar Settings
- Custom Link Settings
- Asset Settings
- E-Invoice Settings
- Payroll Settings
- Purchase Settings
- Recruit Settings
- SMS Setting
- Zoom Settings
- Billing

Dashboard

Dashboard provides a quick overview of Shift Schedule, Tasks, Projects ,performance, Birthdays, My Calendar etc.



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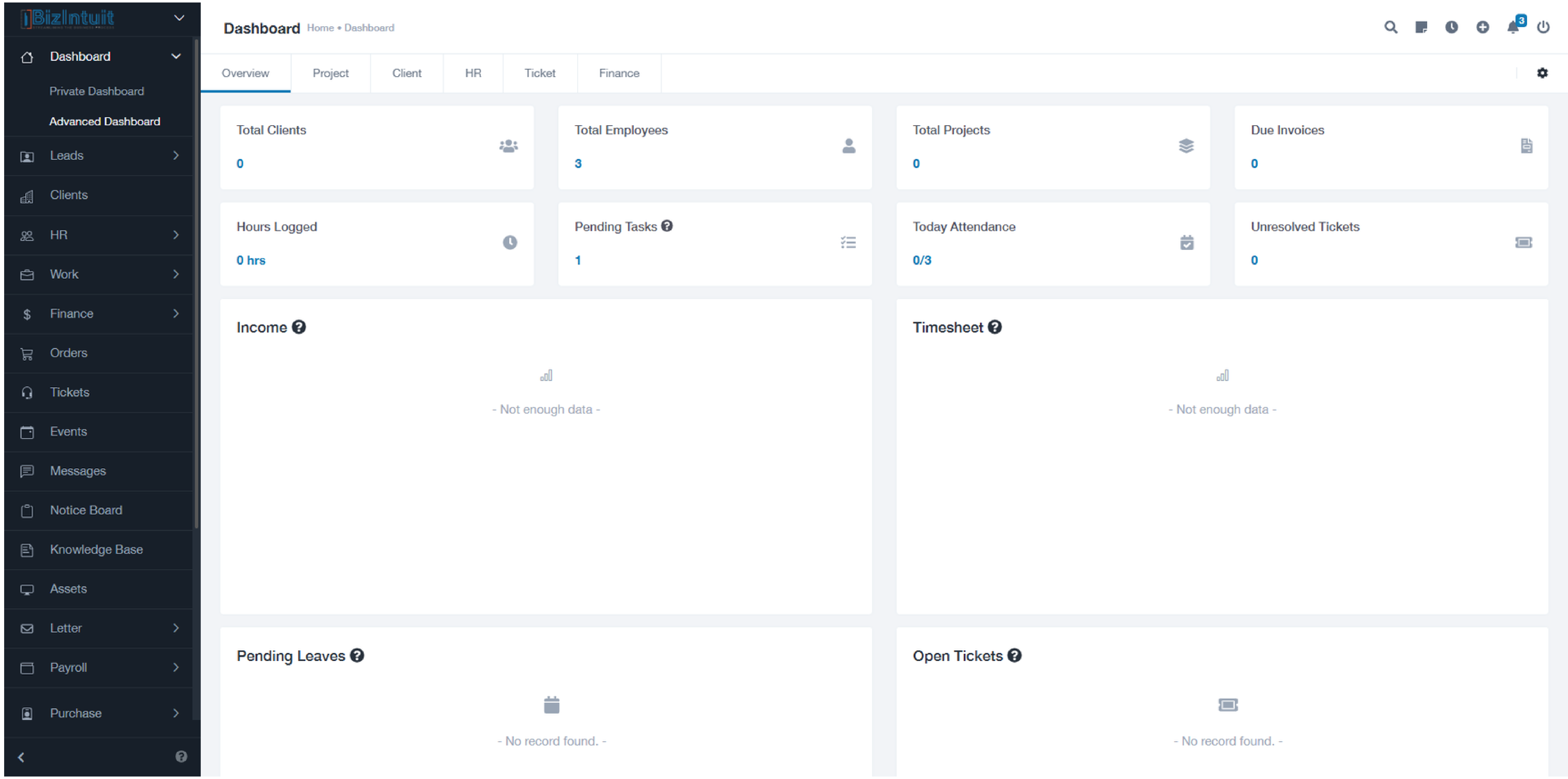
Dashboard

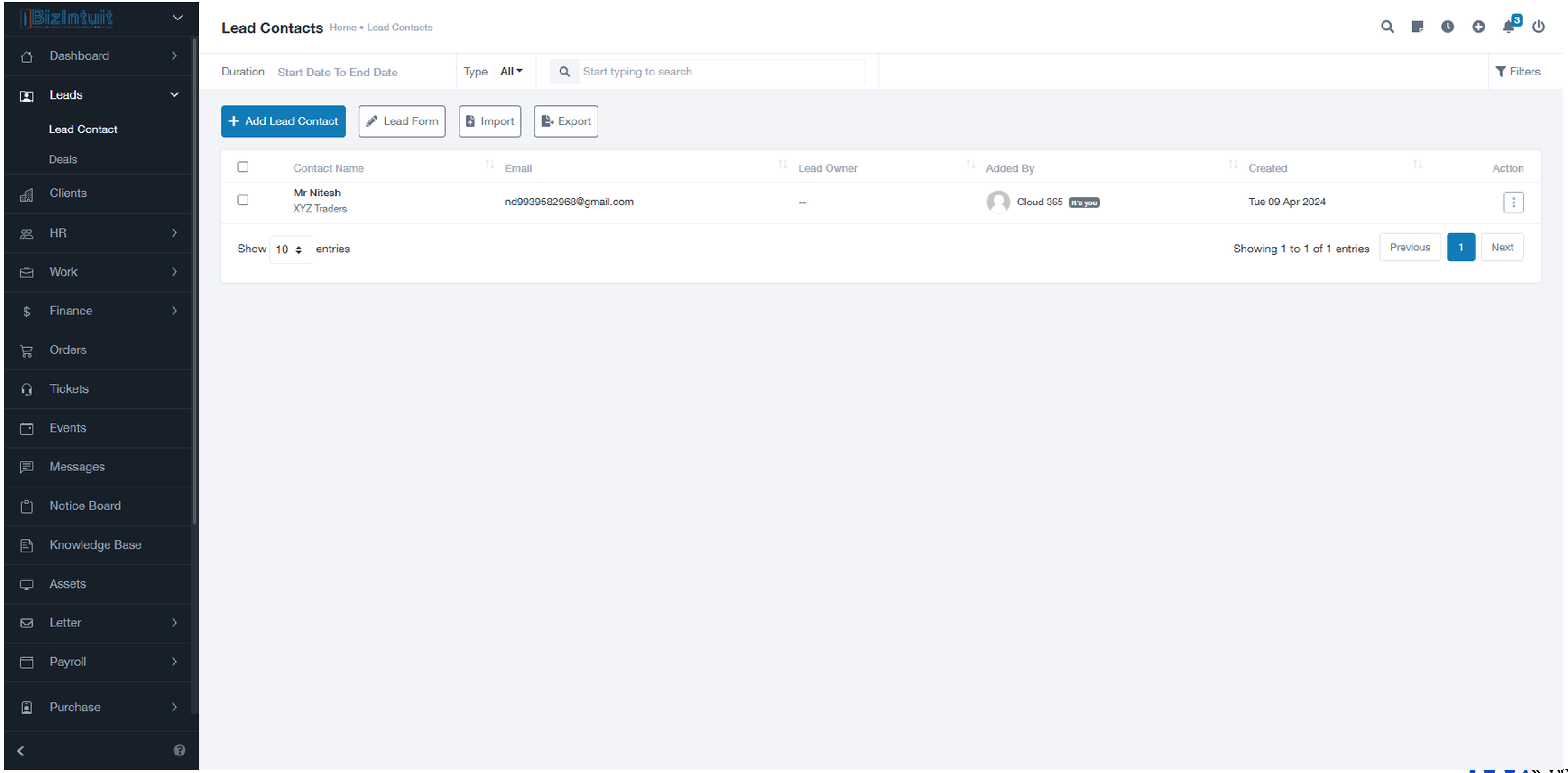
Two Type Of Dashboard

1. Private
2. Advanced



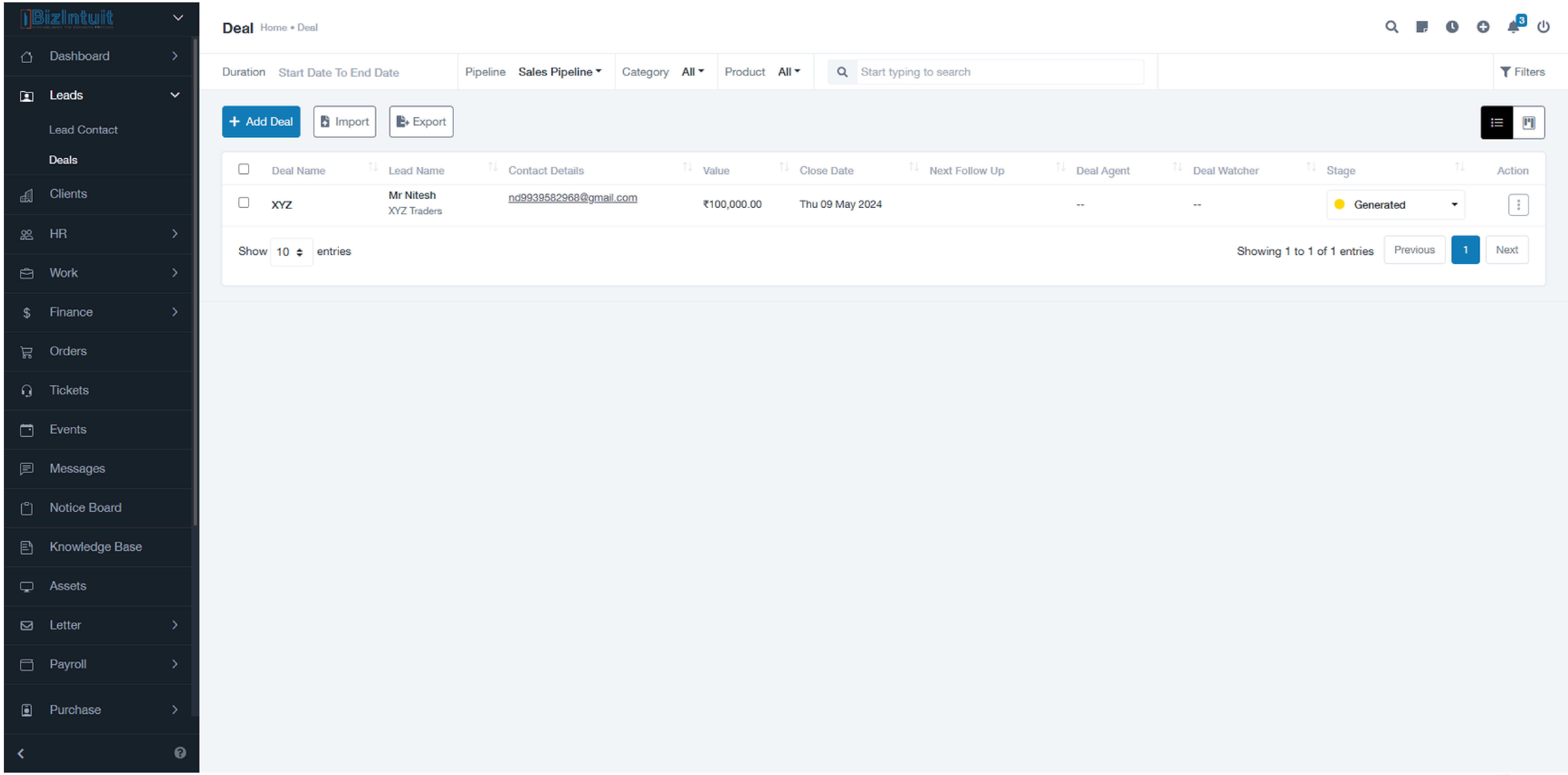
Leads

Lead Contacts Home • Lead Contacts



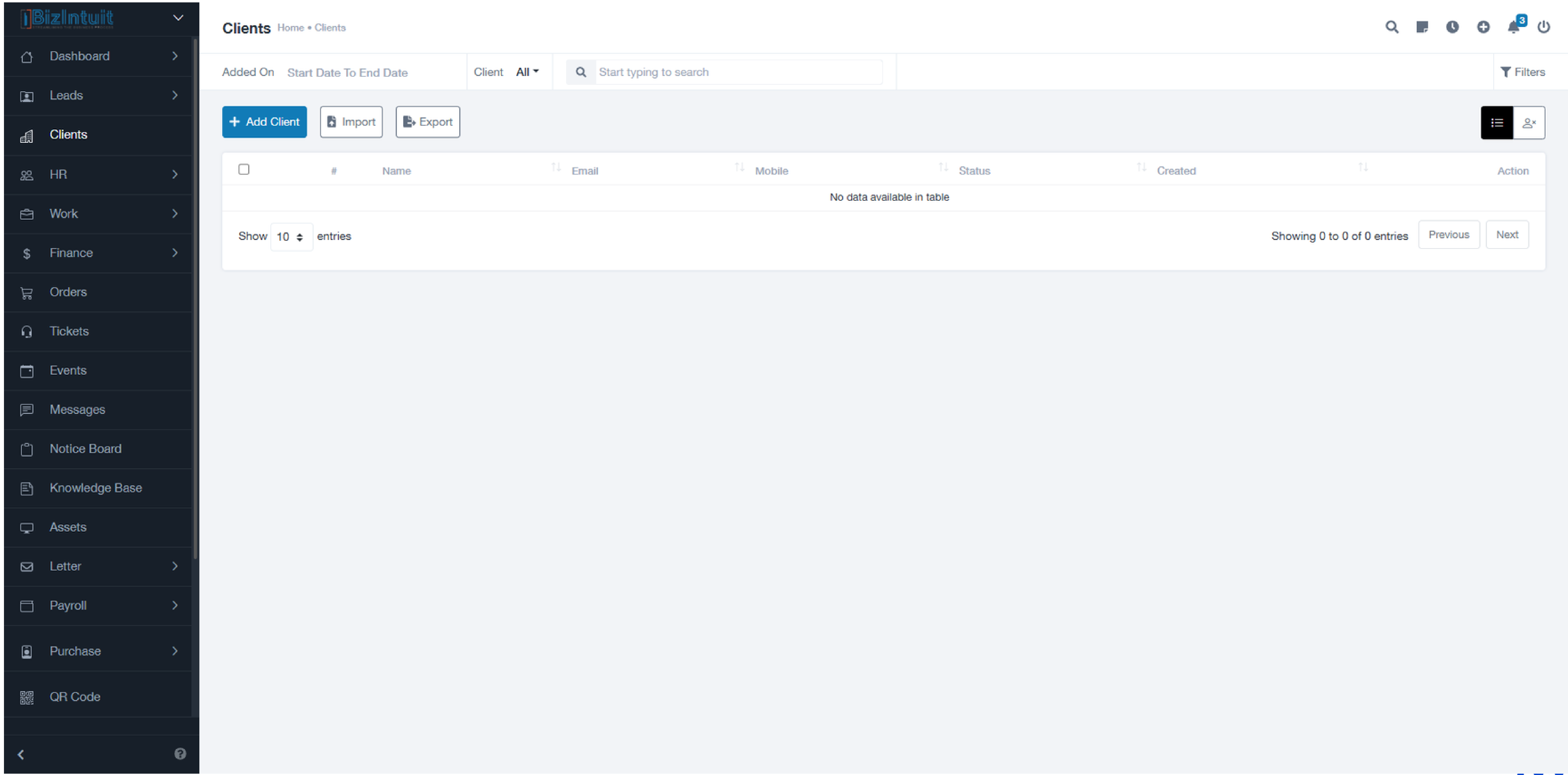
Leads

Deal Home • Deal



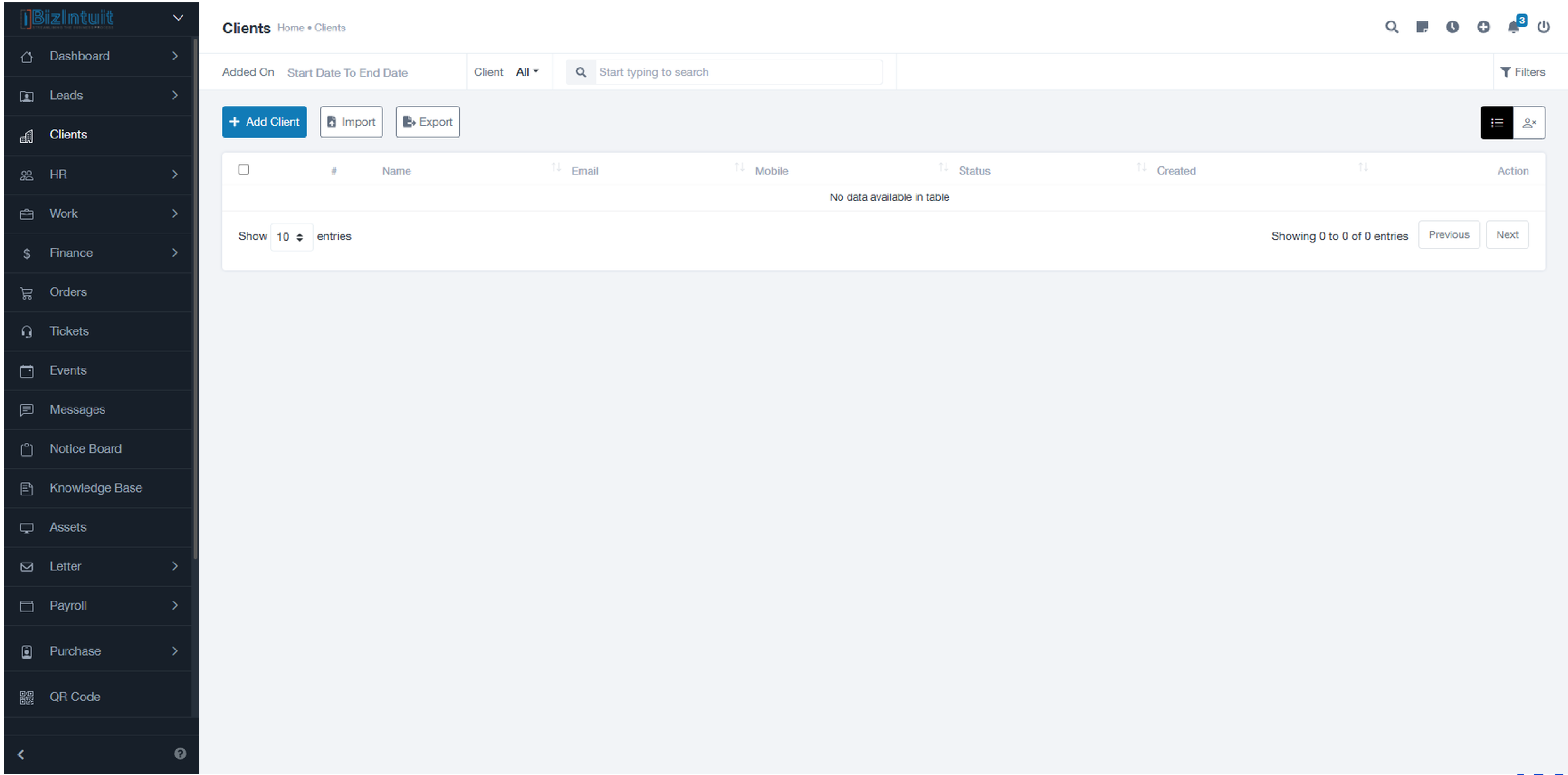
Clients

You can add your clients here and import or export client data in XLS, XLSX, or CSV file formats.



Clients

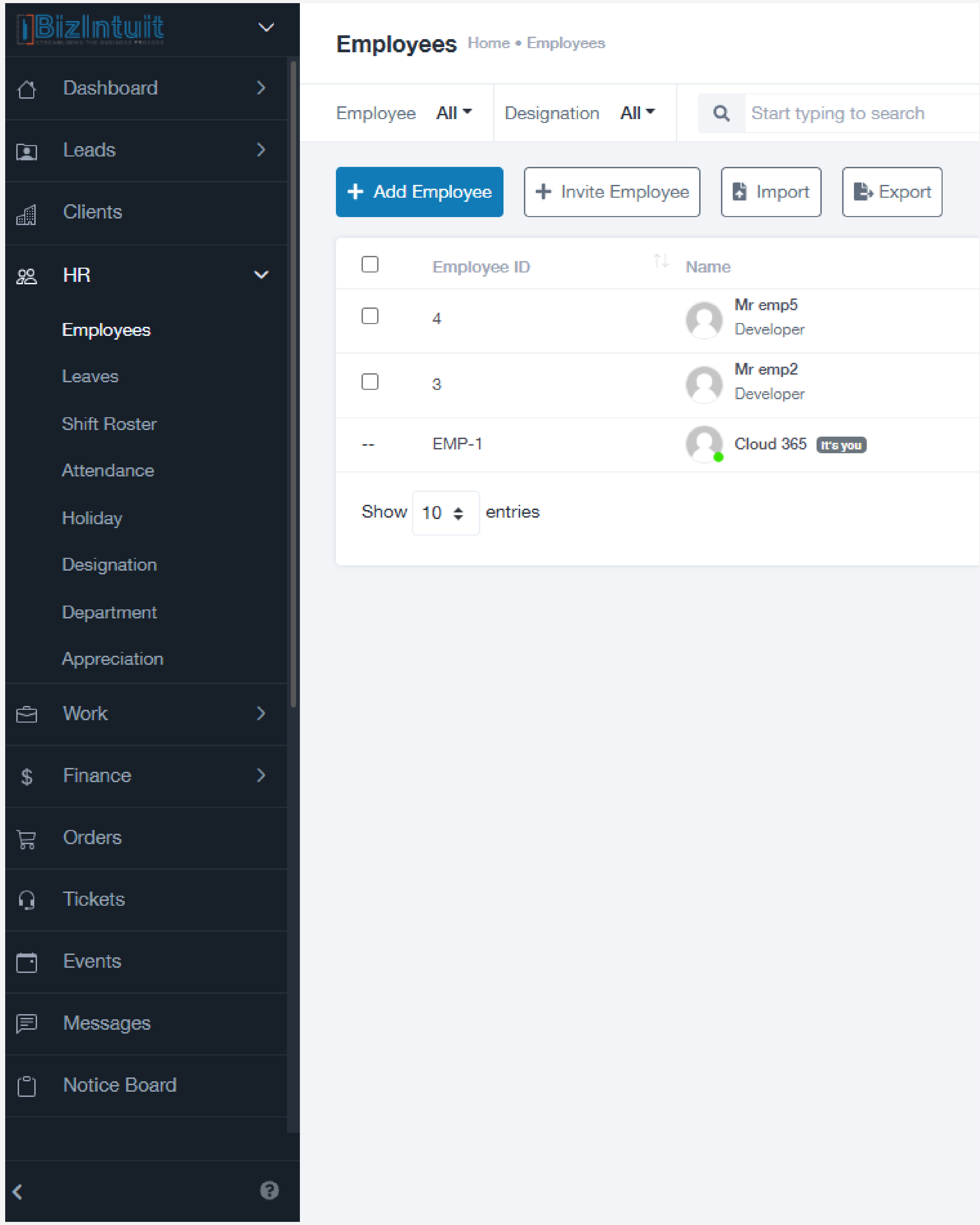
You can add your clients here and import or export client data in XLS, XLSX, or CSV file formats.



HR

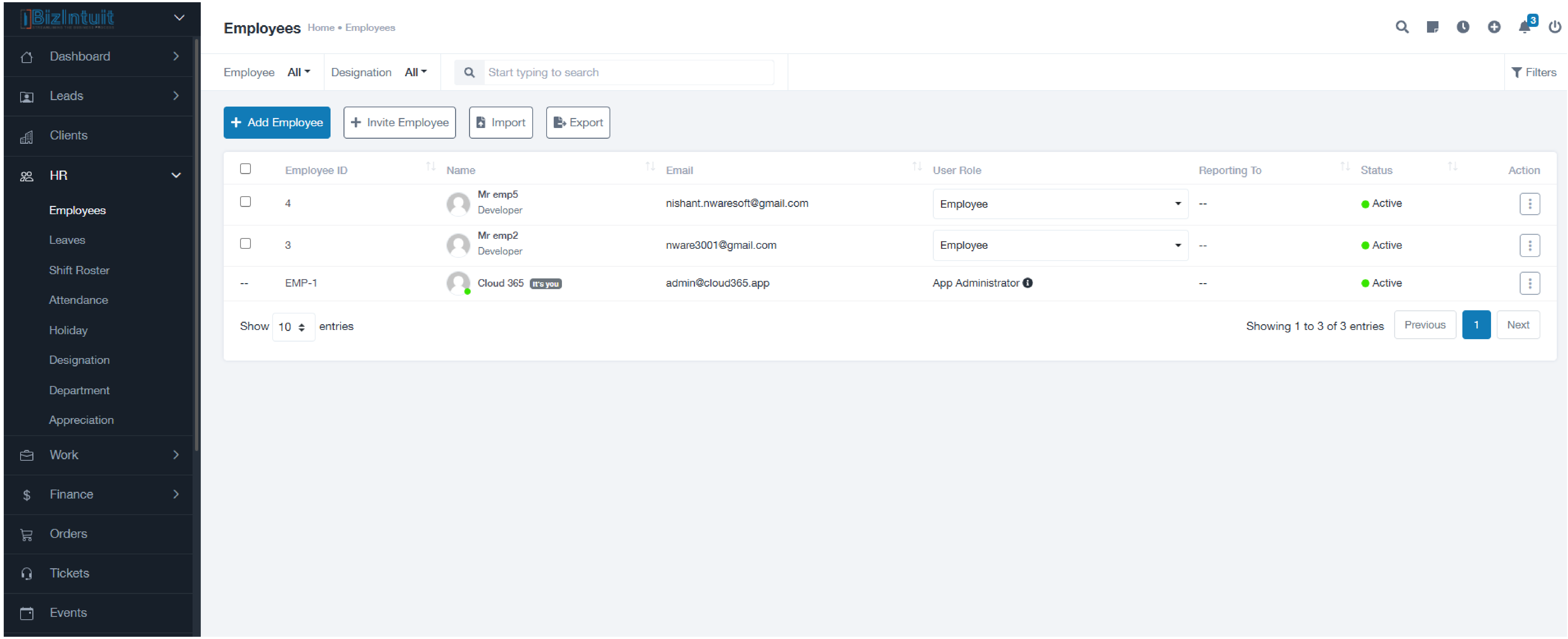
Under the HR tab, you can manage the following:

- Employees
- Leaves
- Shift Roster
- Attendance
- Holidays
- Designations
- Departments
- Appreciation



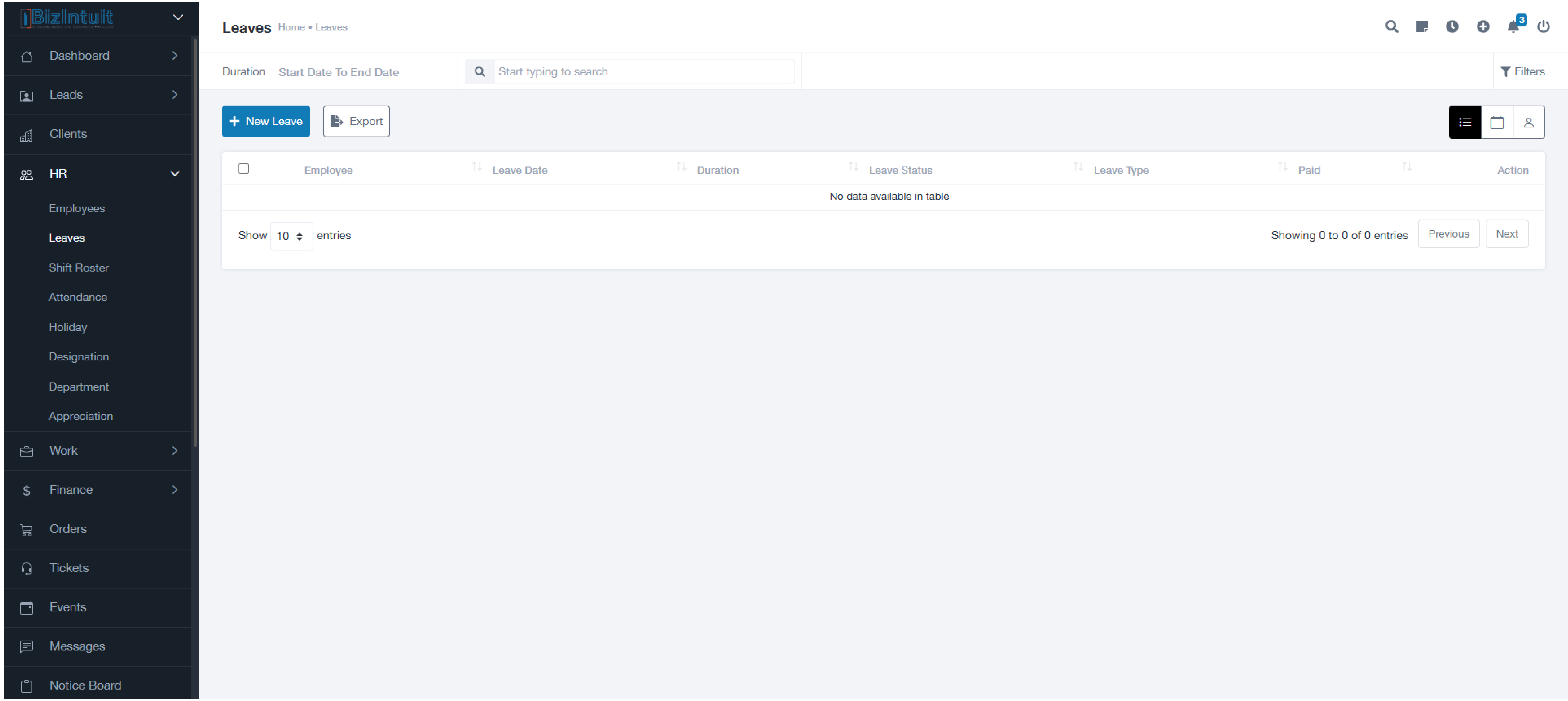
Employees

Under the Employees tab, you can add and invite employees, as well as export the employee list to a spreadsheet.



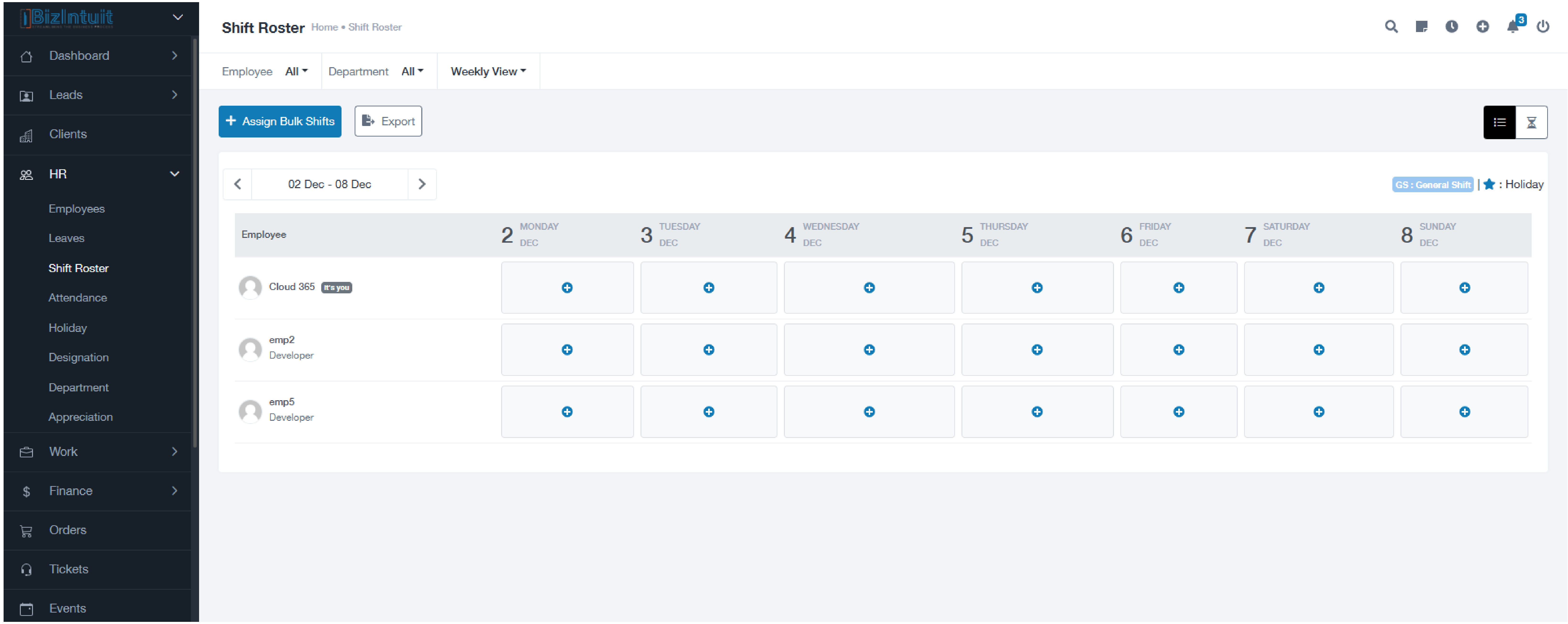
Leaves

In the Leaves section, you can review new leave requests and export leave data to a spreadsheet.



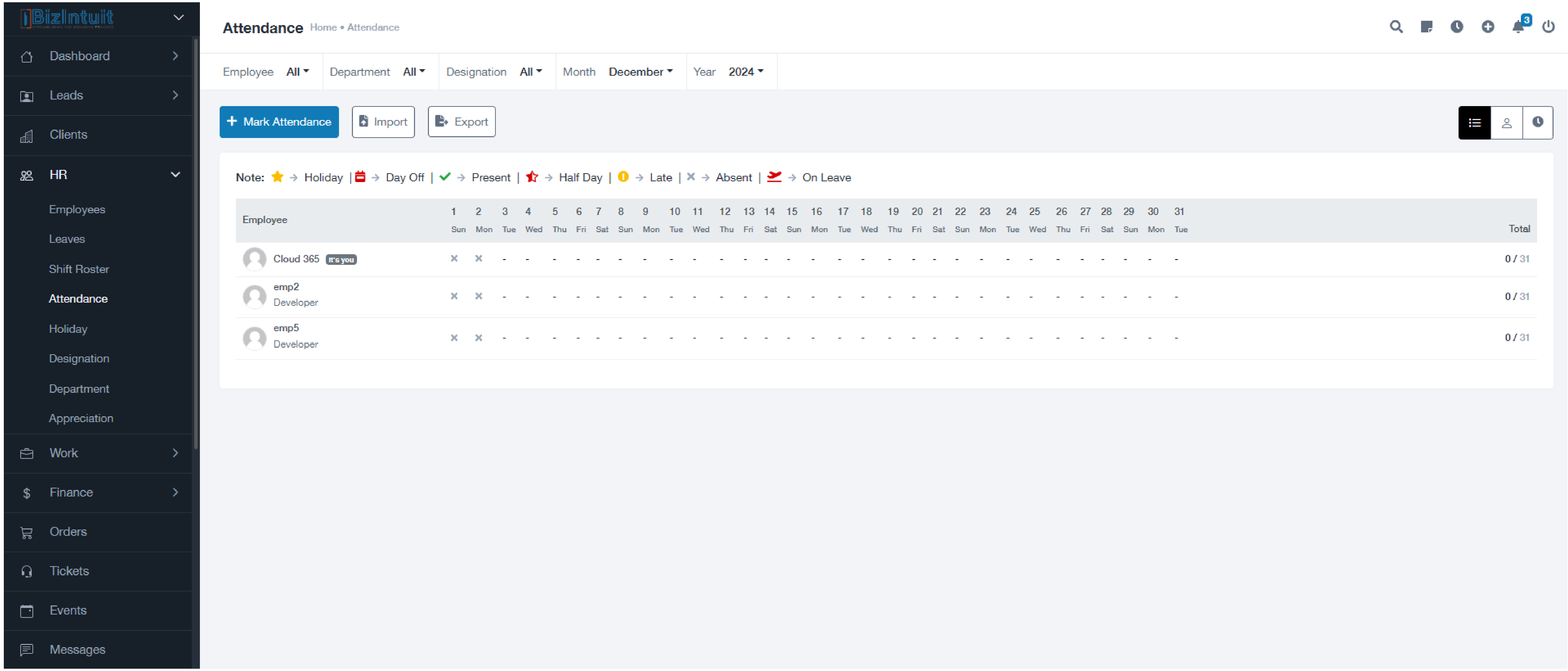
Shift Roster

Under the Shift Roster, you can view the shifts worked by employees across all departments and at any given time.



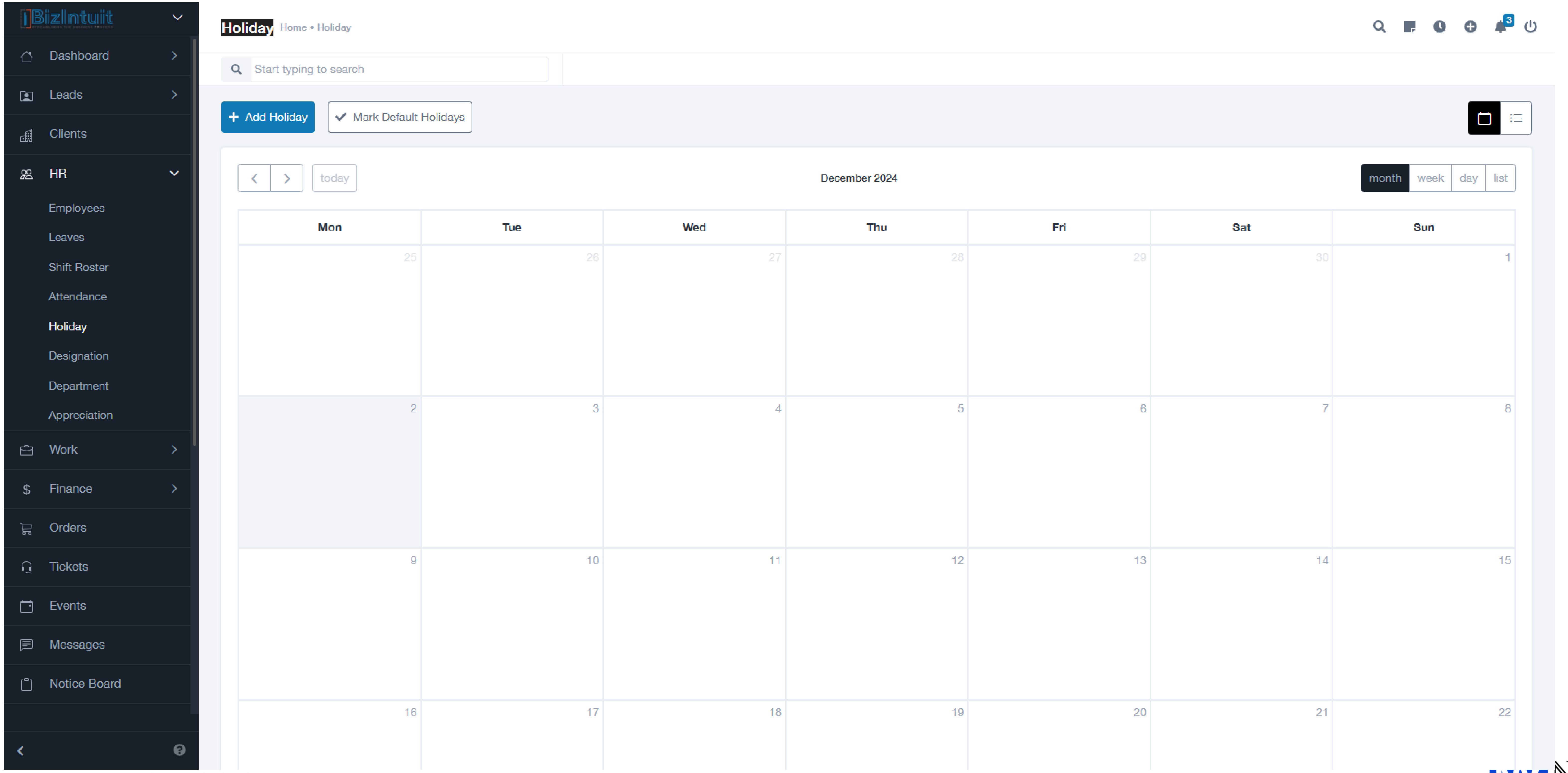
Attendance

Under the Attendance section, you can track and manage employee attendance, including checking in and out times, absences, and overall attendance records.



Holiday

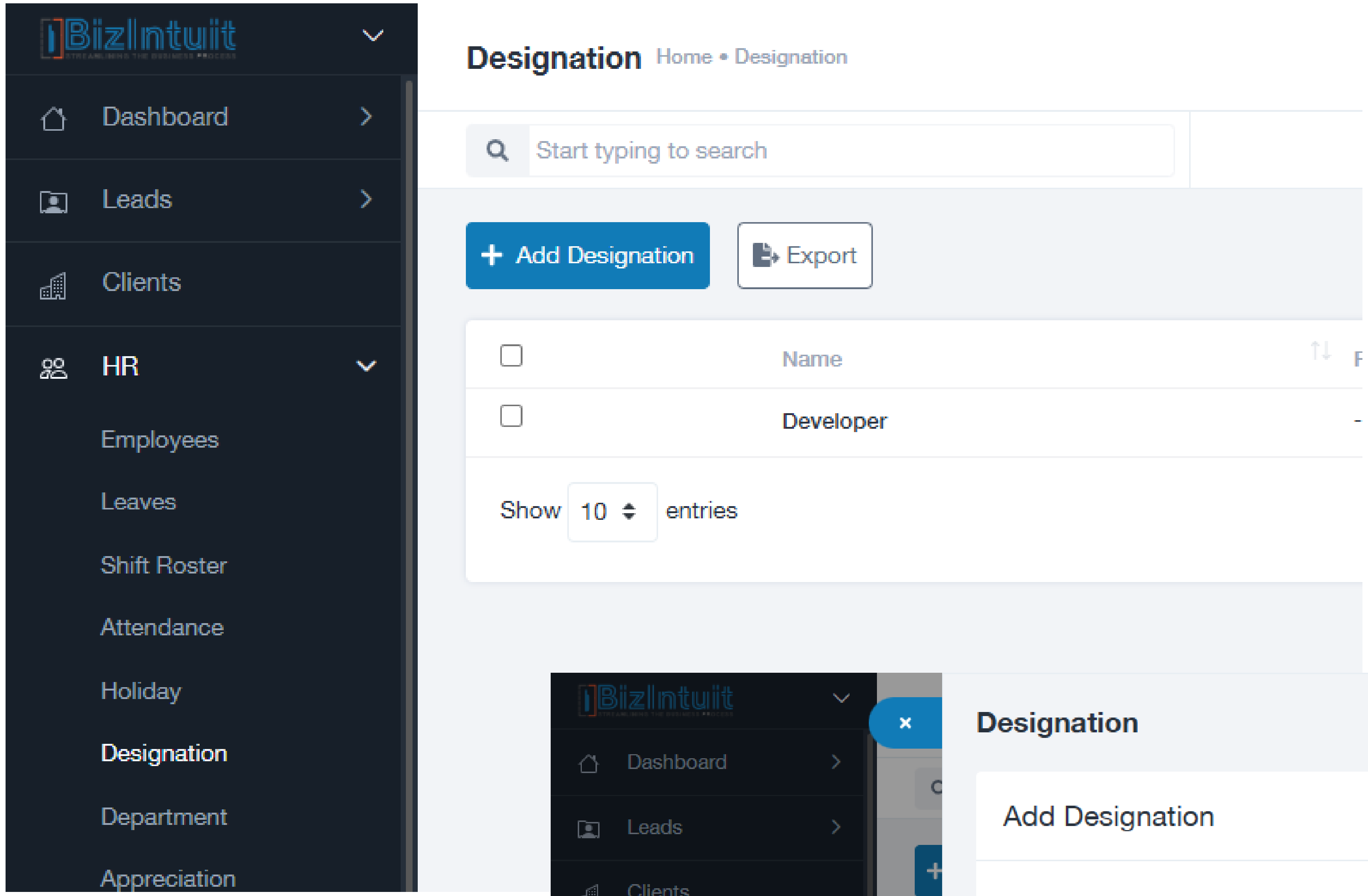
The Holiday section now allows you to add and manage employee holidays.

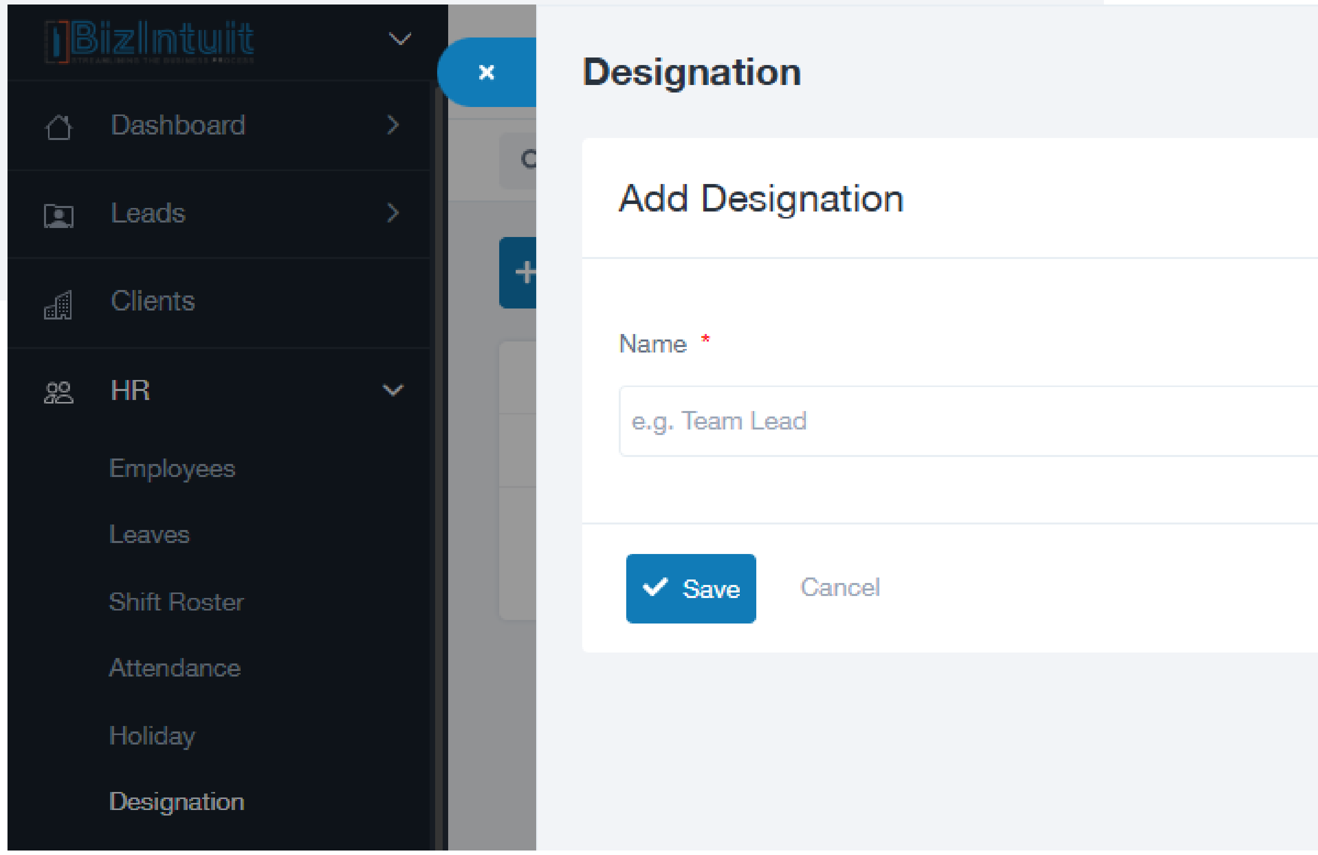


Designation

Under the Designation tab, you can manage the following:

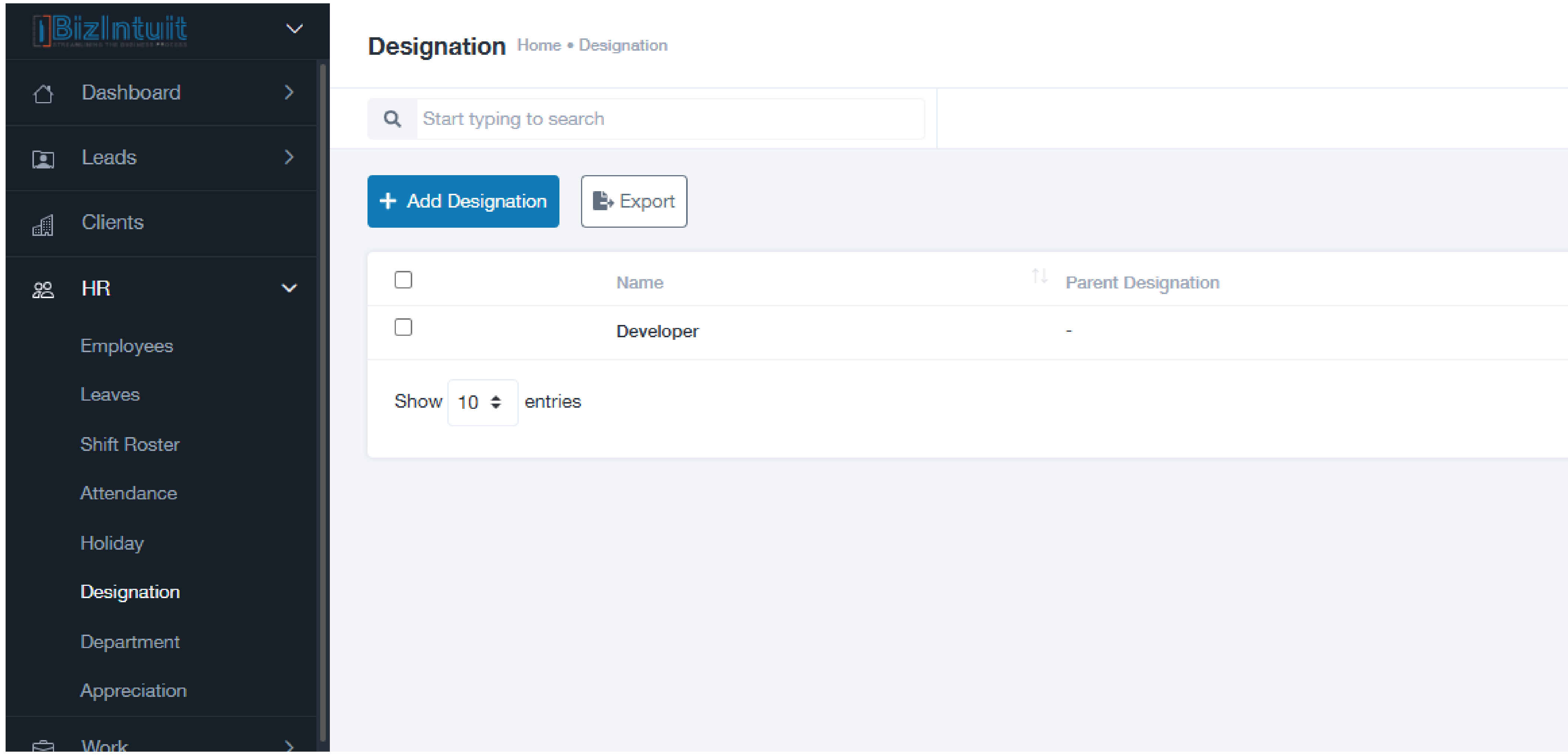
- Adding and managing employee designations.
- Linking designations to specific roles or departments.
- Tracking designation history for each employee.





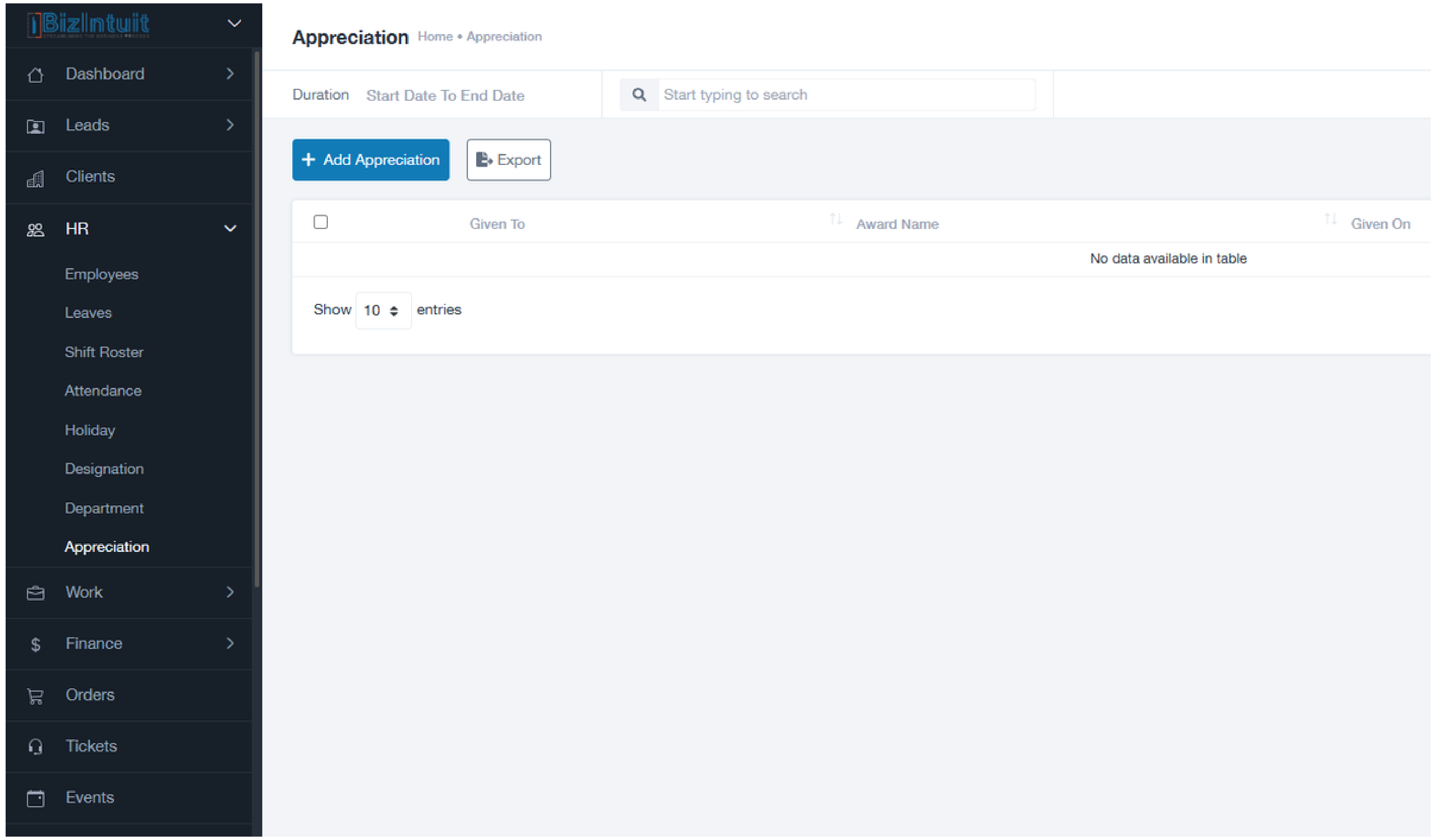
Department

The Department section now supports adding departments and exporting them to a sheet.

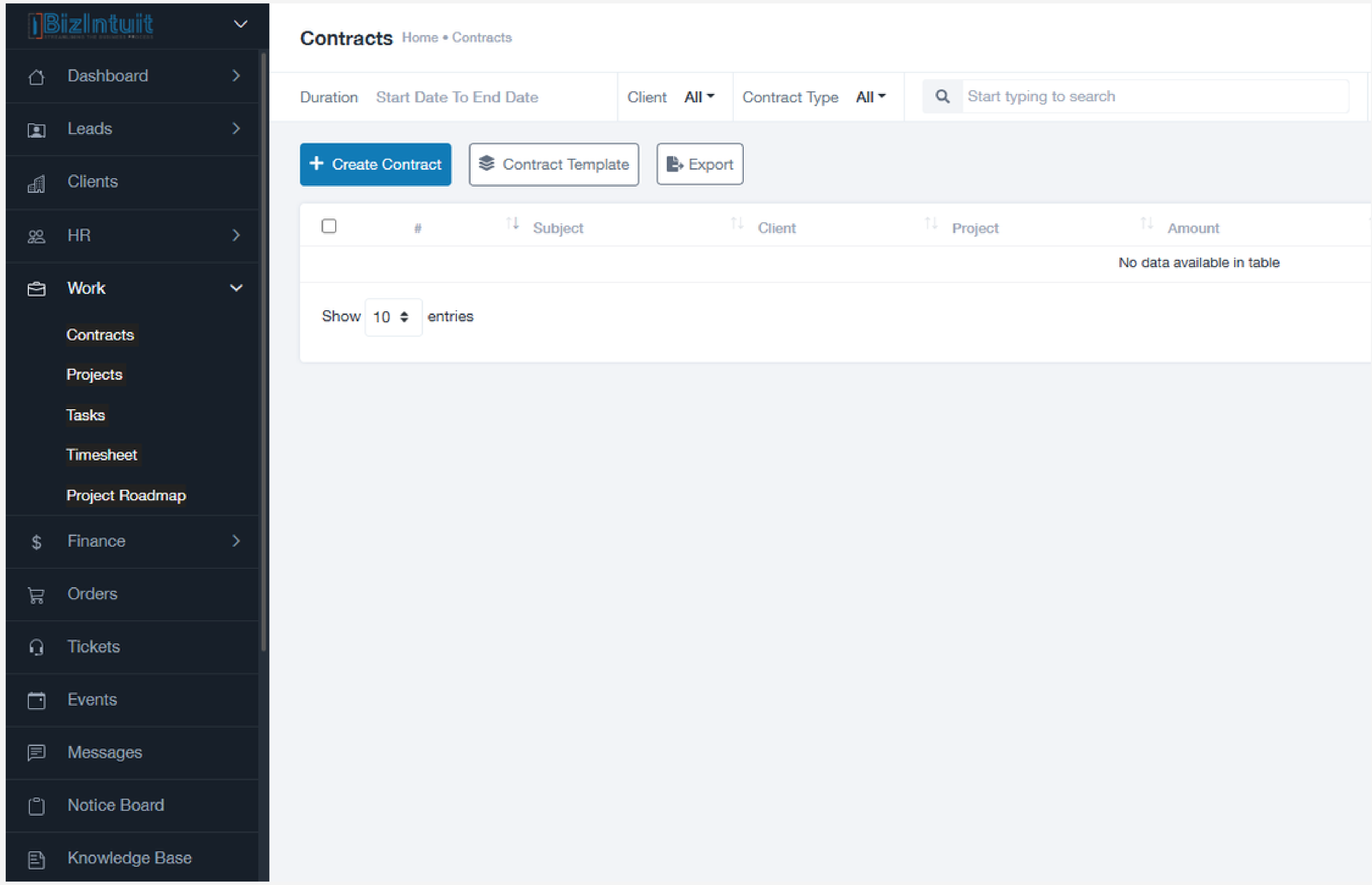


Appreciation

The Appreciation section now includes the ability to add employee recognition and export it to a sheet.



Work

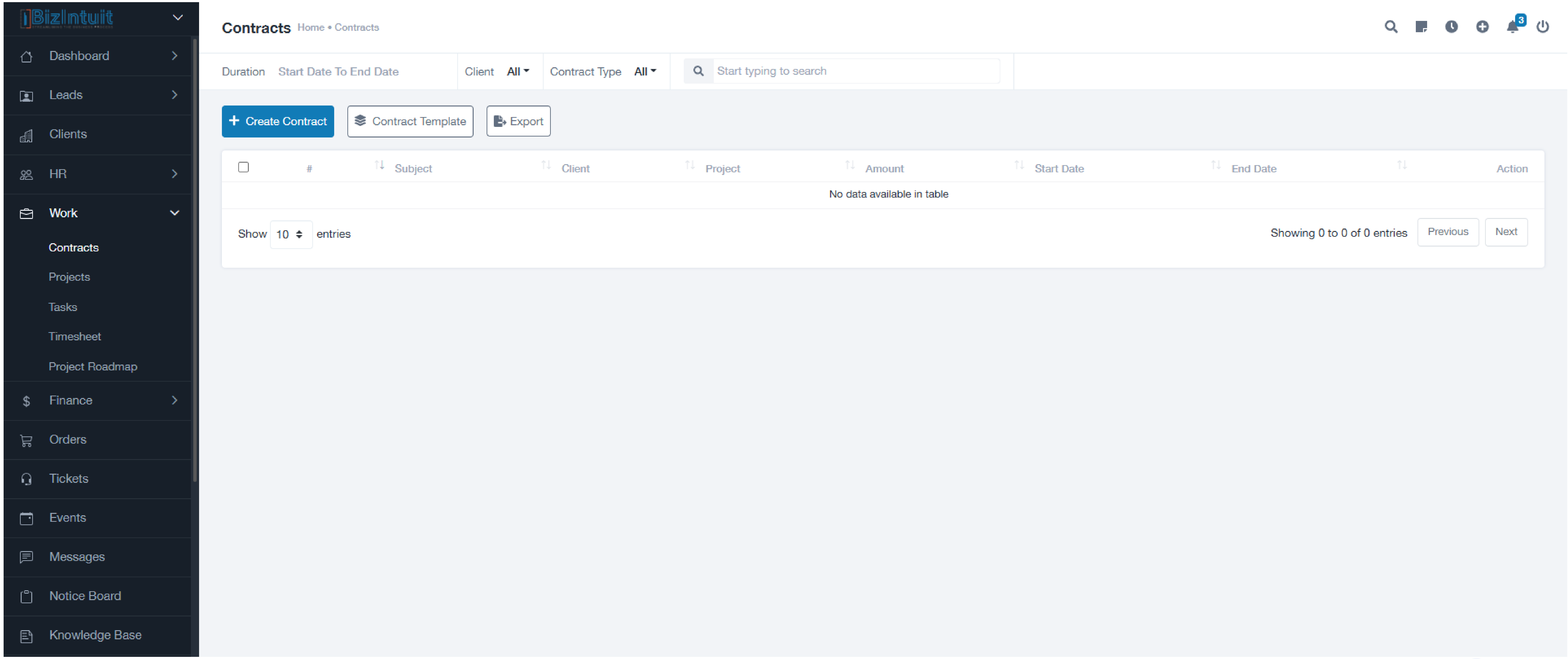


Work" tab that includes sections for managing:

- Contracts
- Projects
- Tasks
- Timesheet
- Project Roadmap

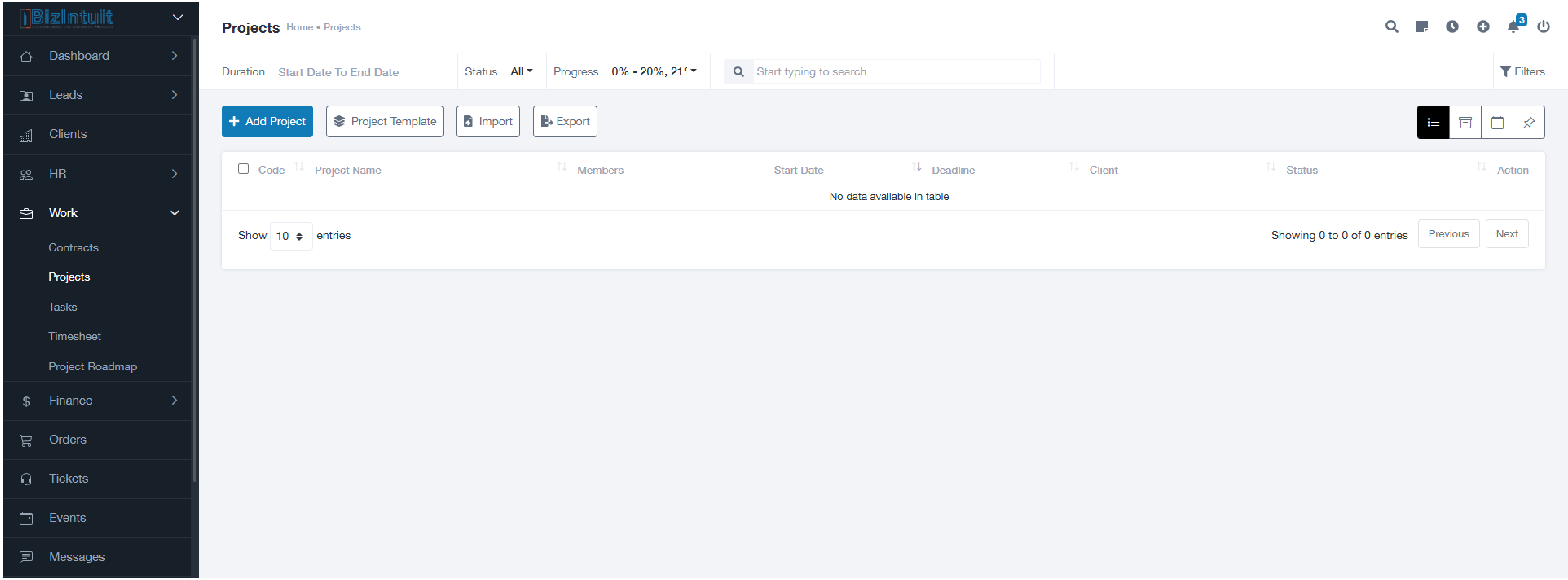
Contracts

In the Contracts section, you can create contracts, use existing templates for contract creation, and export templates as needed.



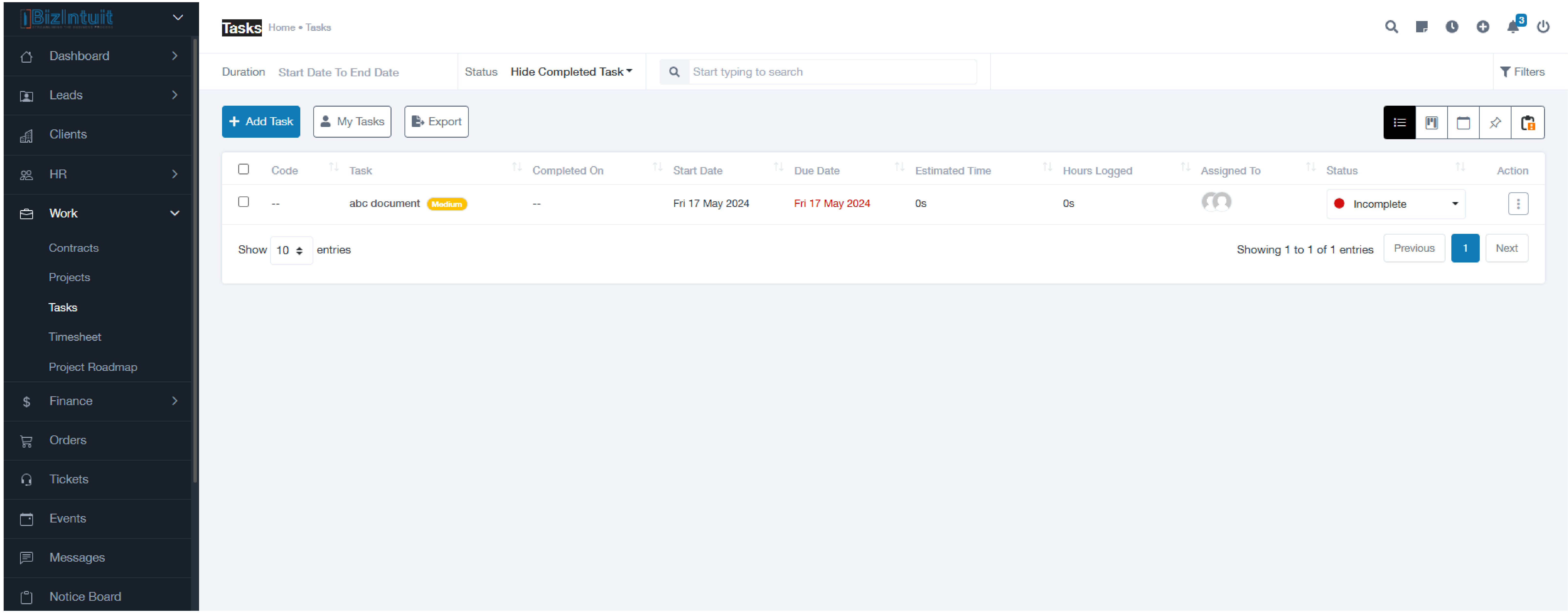
Projects

In the Projects section, you can add new projects, use existing templates, import and export projects, and track the progress and status of each project.



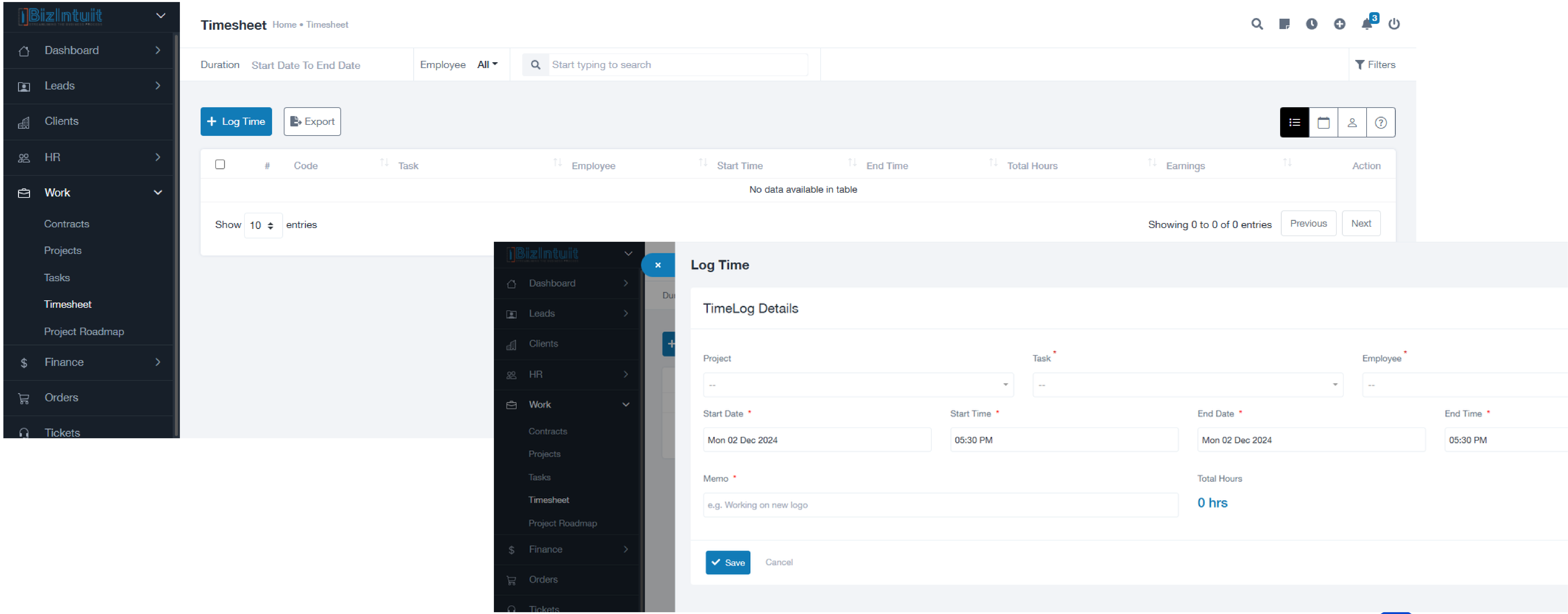
Tasks

In the Tasks section, you can create and manage tasks, assign them to team members, set deadlines, track progress, and prioritize tasks for efficient project management.



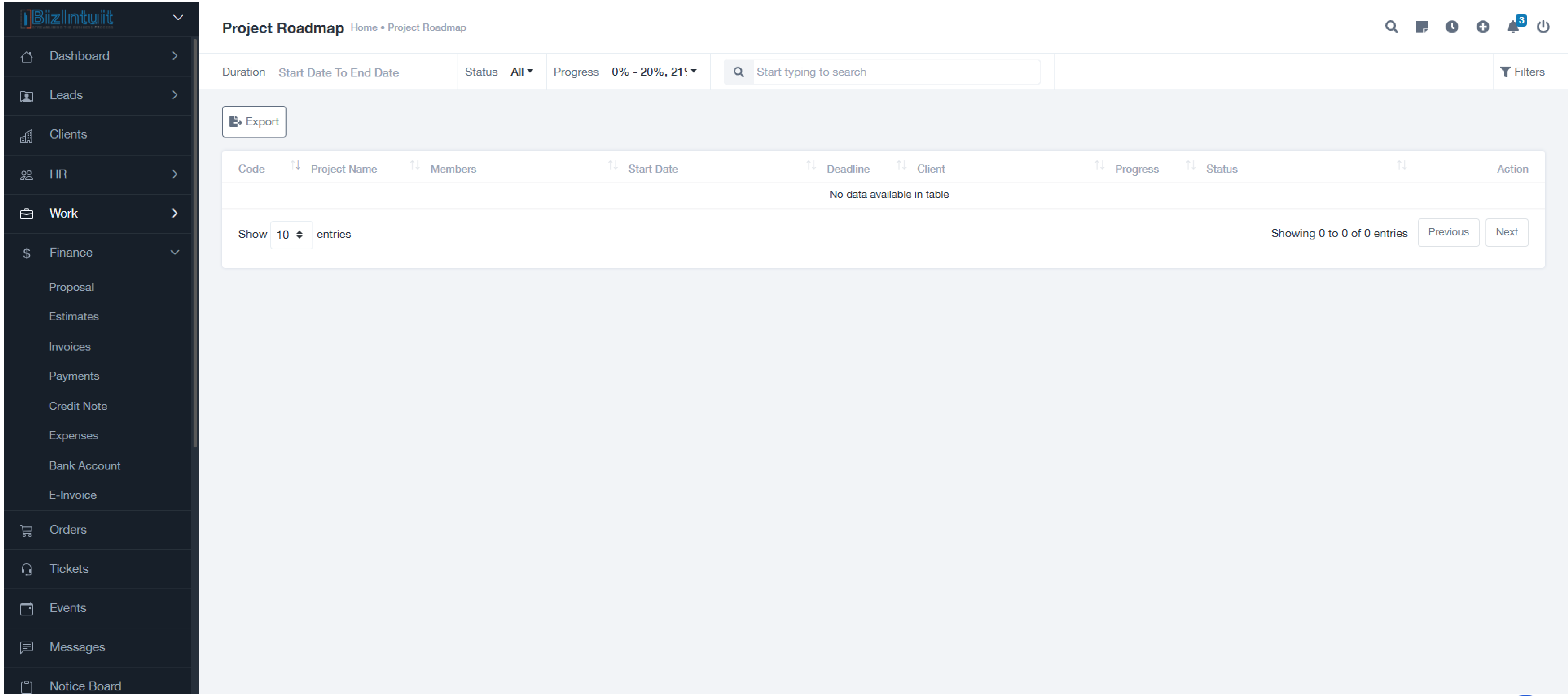
Timesheet

In the Timesheet section, you can track and manage employee work hours, record attendance, generate timesheet reports, and ensure accurate billing and payroll management.

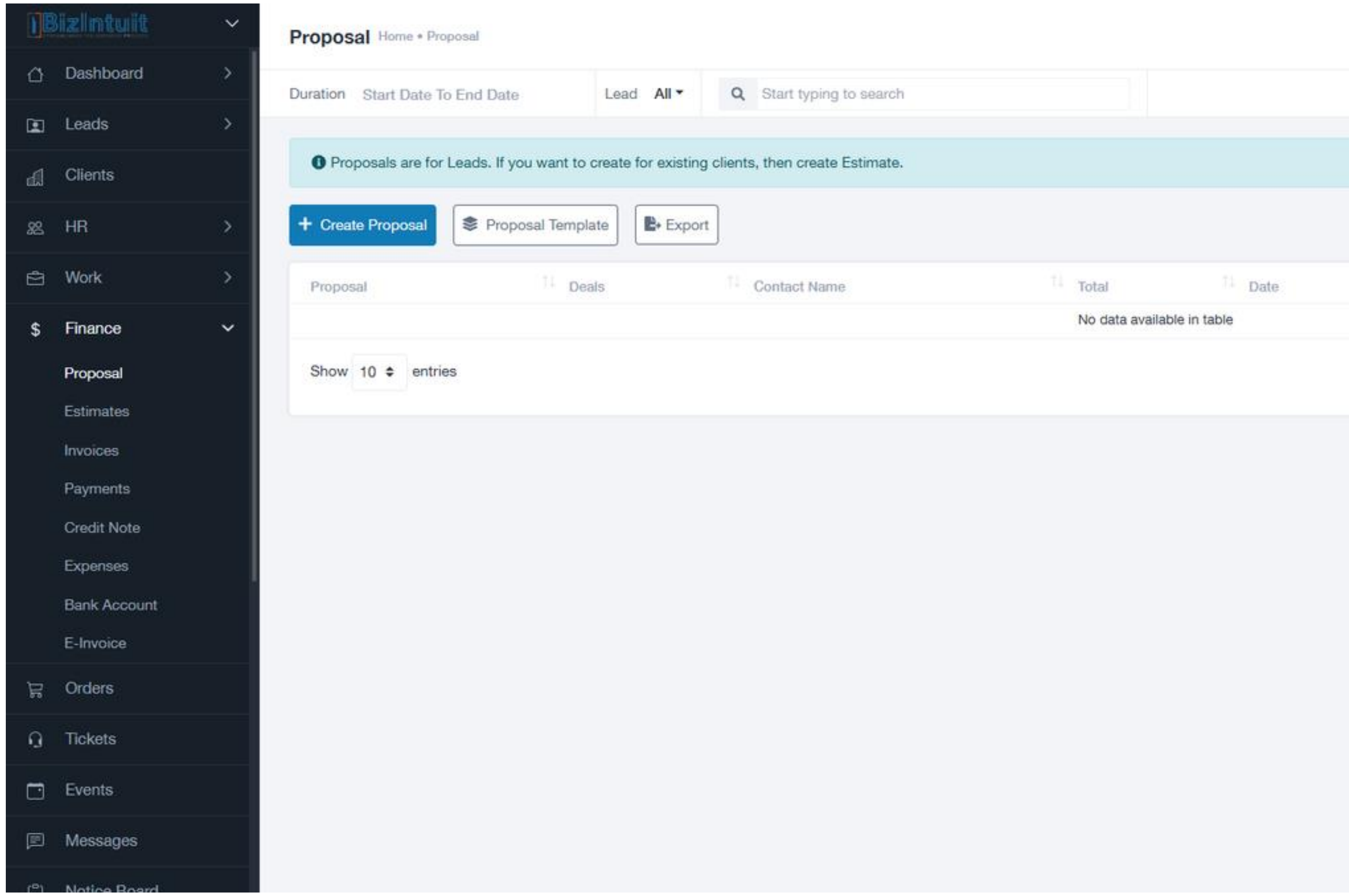


Project Roadmap

In the Project Roadmap section, you can plan and visualize project timelines, set key milestones, track progress, and manage deliverables to ensure timely project completion.



Finance

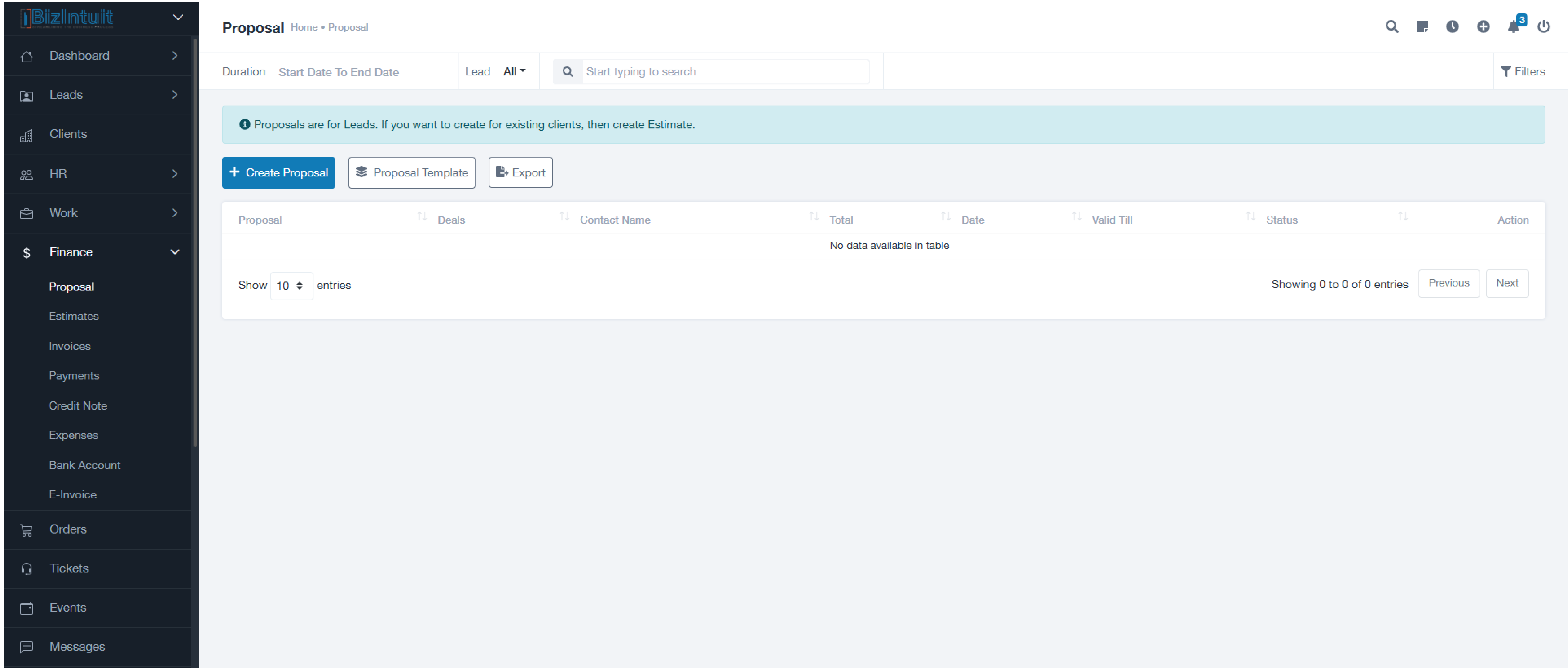


Under the Finance section, you can manage:

- Proposals
- Estimates
- Invoices
- Payments
- Credit Notes
- Expenses
- Bank Accounts
- E-Invoices

Proposal

Proposals are specifically for leads, while estimates should be created for existing clients. Let me know if you need further customization or clarification. You can now create and export proposals.



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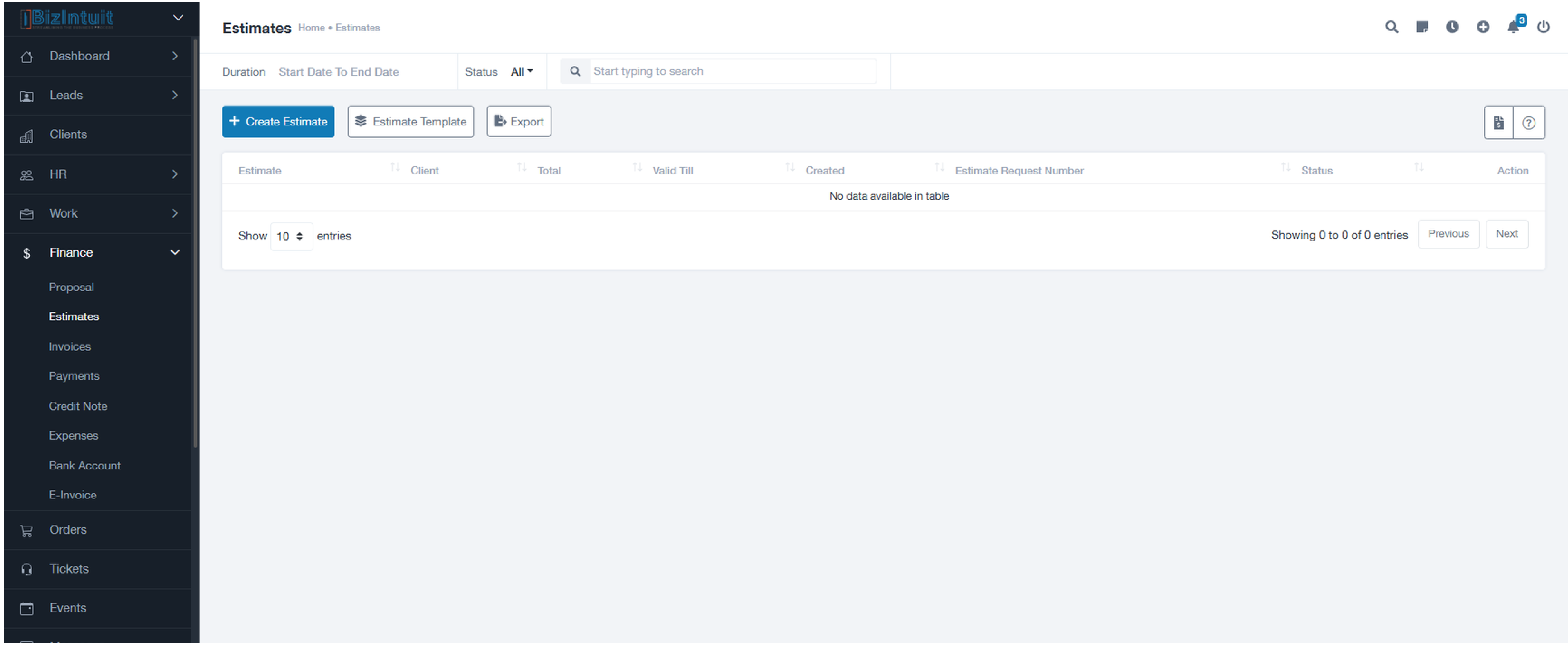
Estimates

In the Estimates section, you can create, manage, and export estimates for existing clients. You can also customize the estimates with detailed pricing, terms, and service descriptions.



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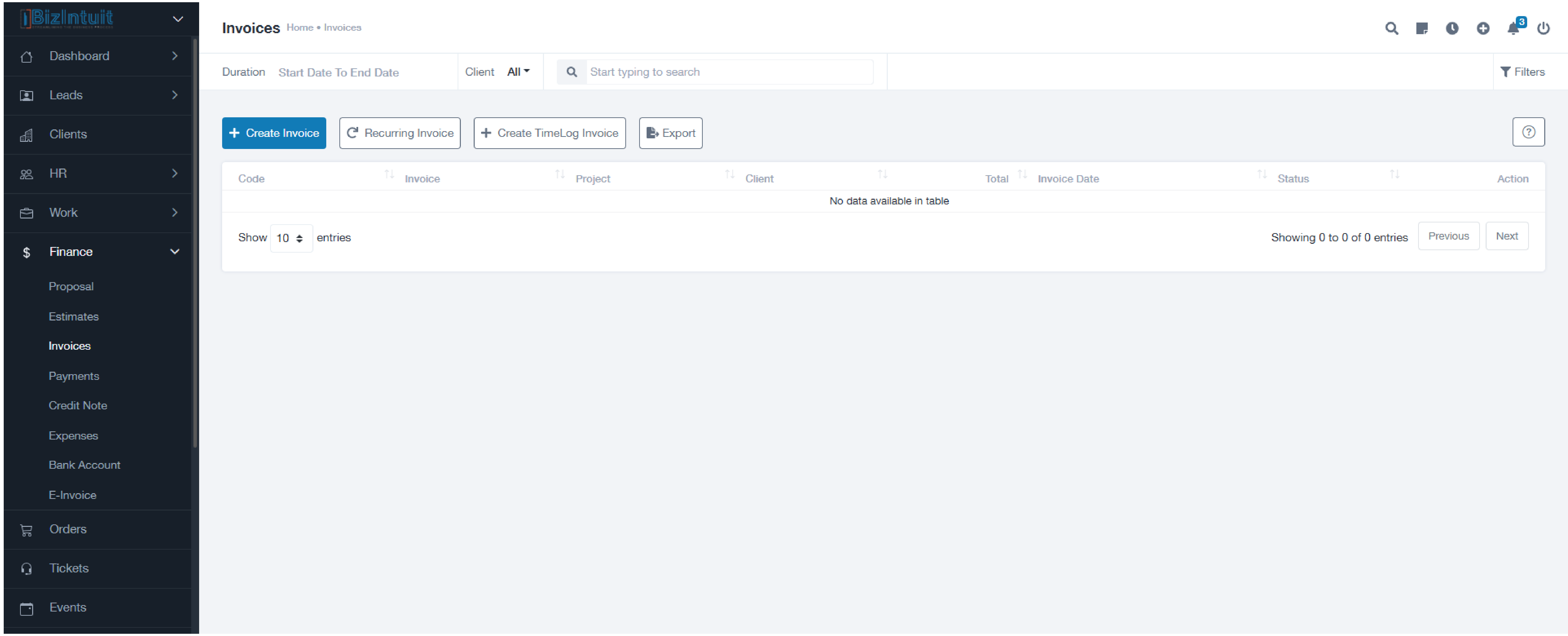
Invoices

In the Invoices section, you can create, manage, and export invoices, customize them with payment terms, itemized charges, and due dates, and track payment statuses for clients.



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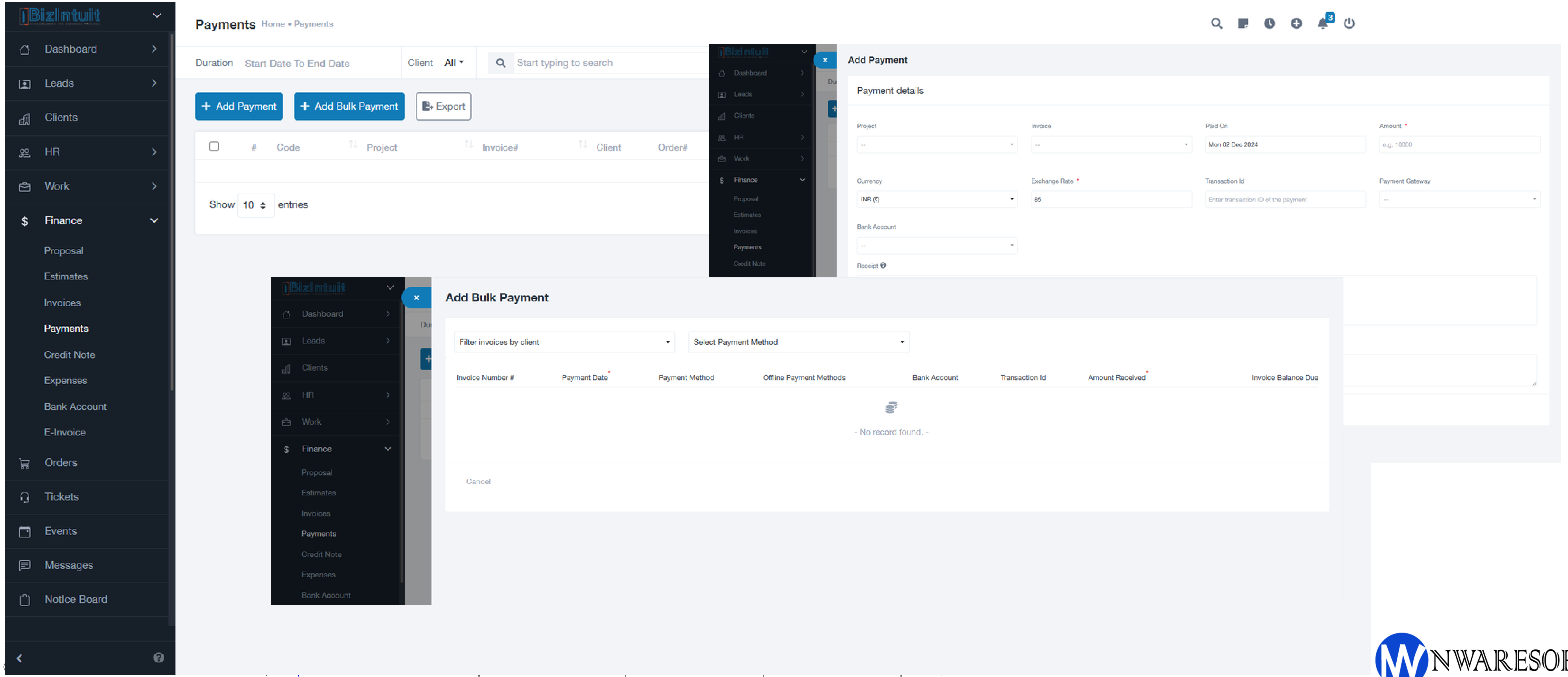
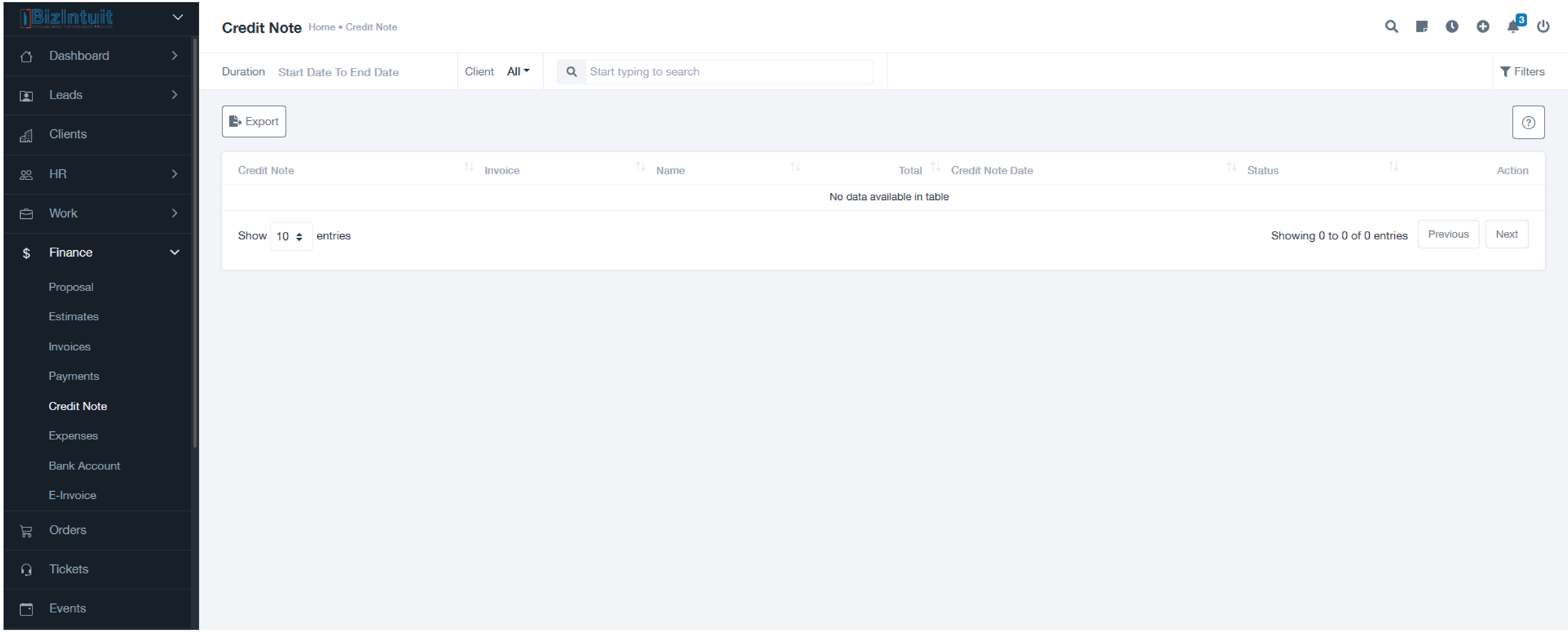
Payments

In the Payments section, you can track and manage incoming payments, record payment details, mark invoices as paid, & generate payment reports for accurate financial tracking.



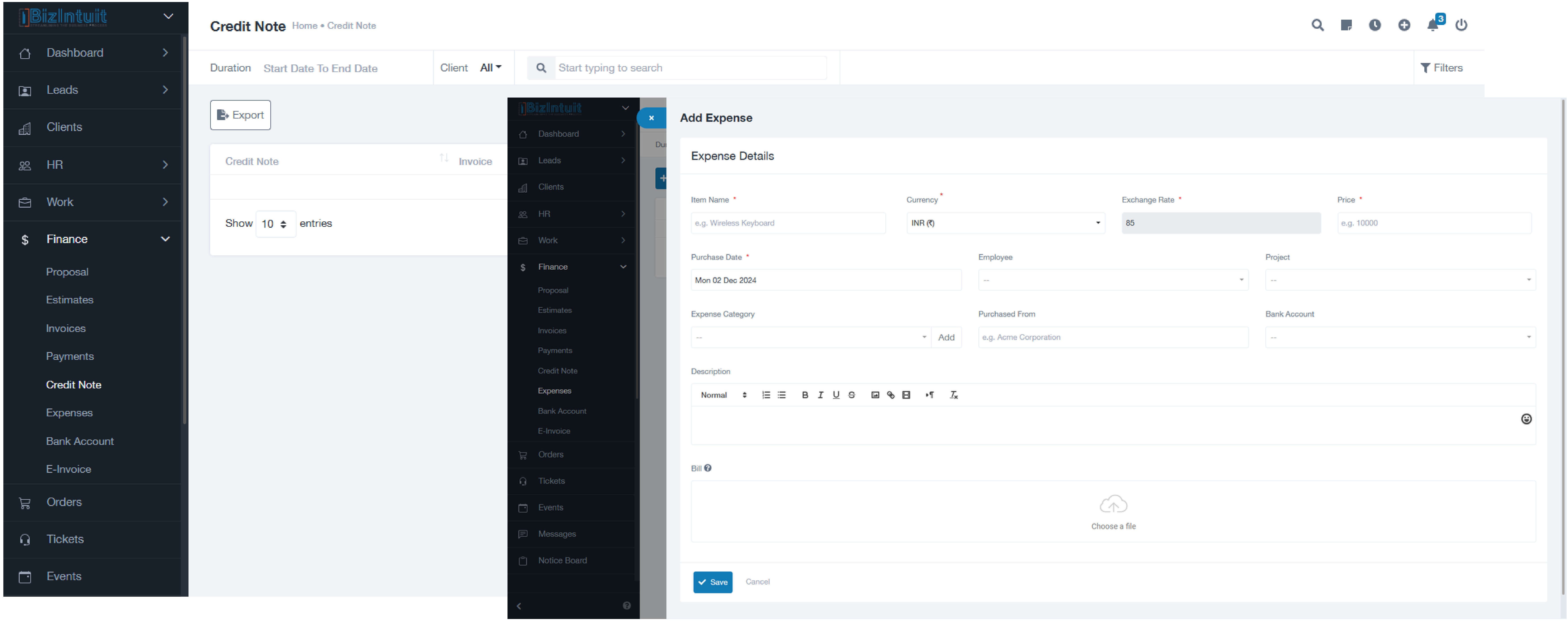
Credit Note

you can create and manage credit notes, apply them to specific invoices, adjust amounts for returned goods or overpayments, & export credit note details for financial record-keeping.



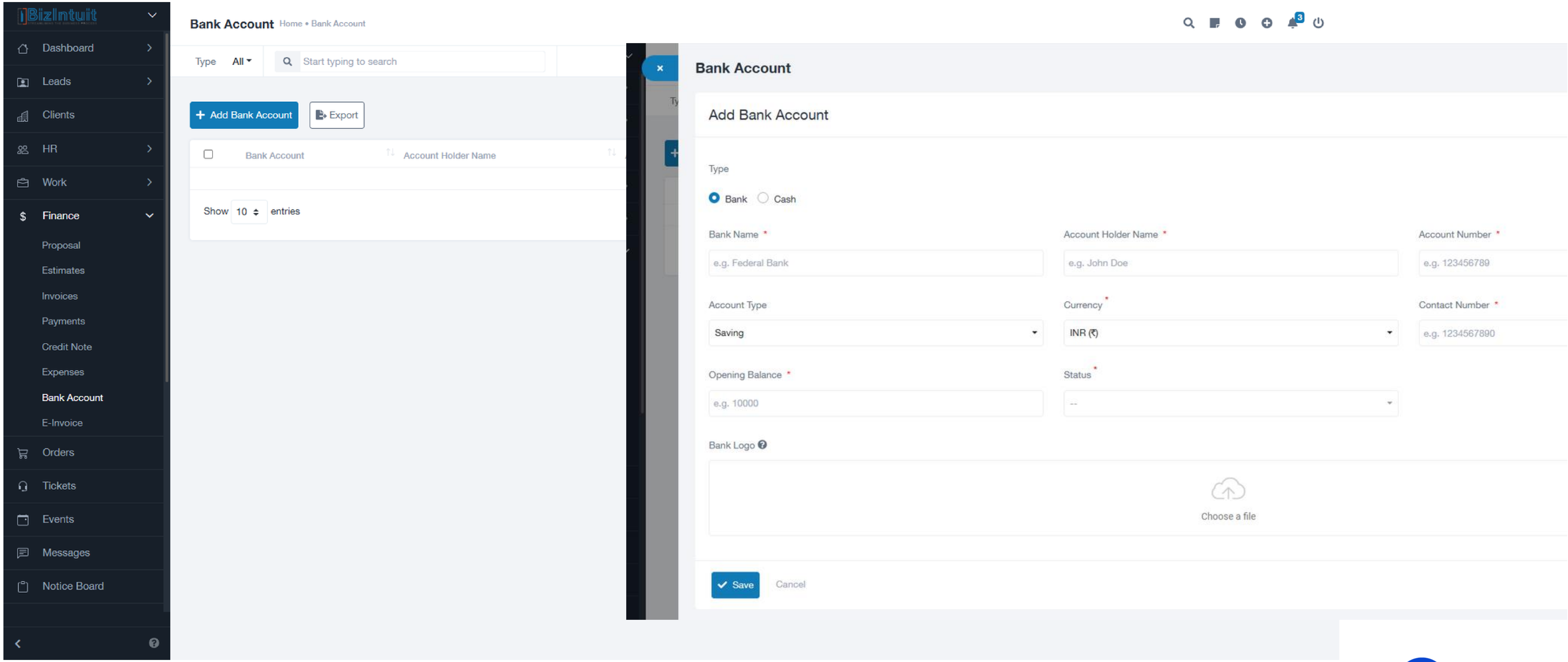
Expenses

you can track and manage both regular and recurring expenses, categorize them, and export expense records for financial analysis and reporting.



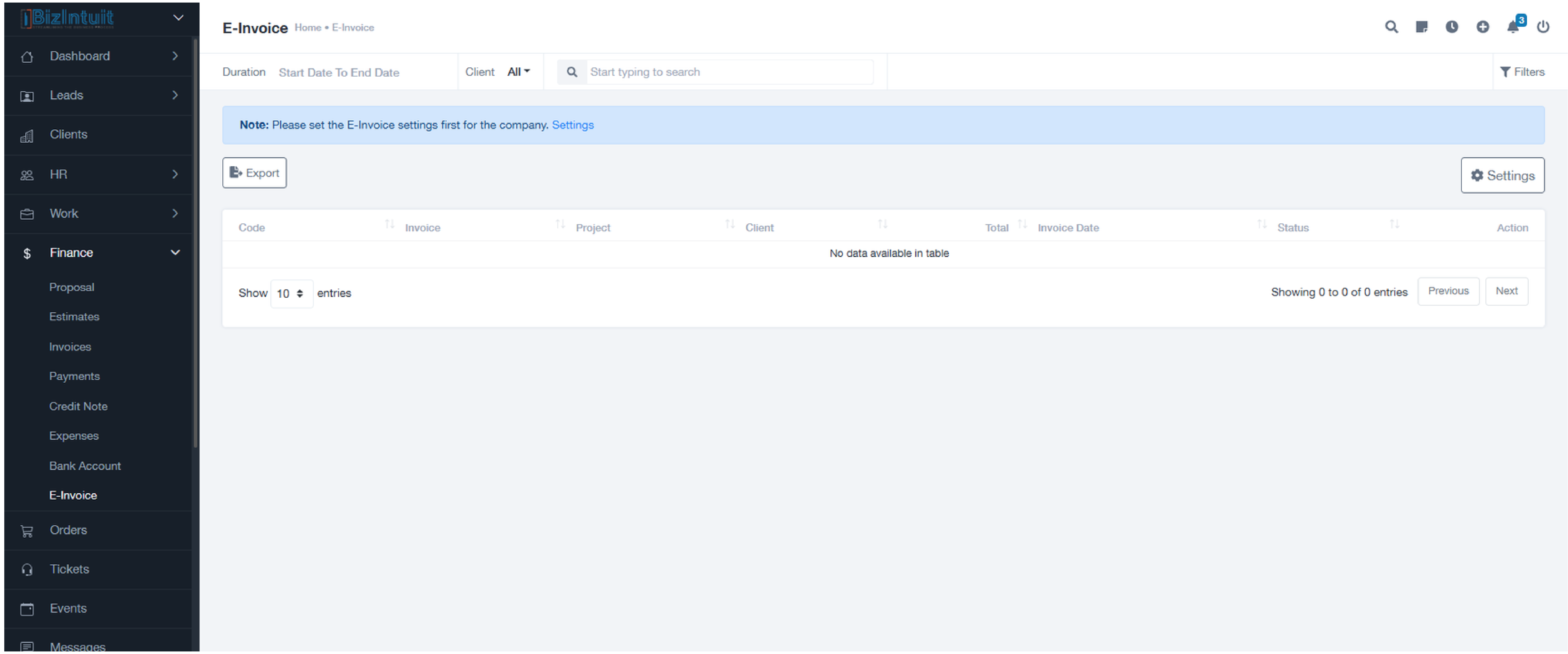
Bank Account

you can manage and track your business bank accounts, monitor balances, record transactions, and reconcile bank statements for accurate financial management.



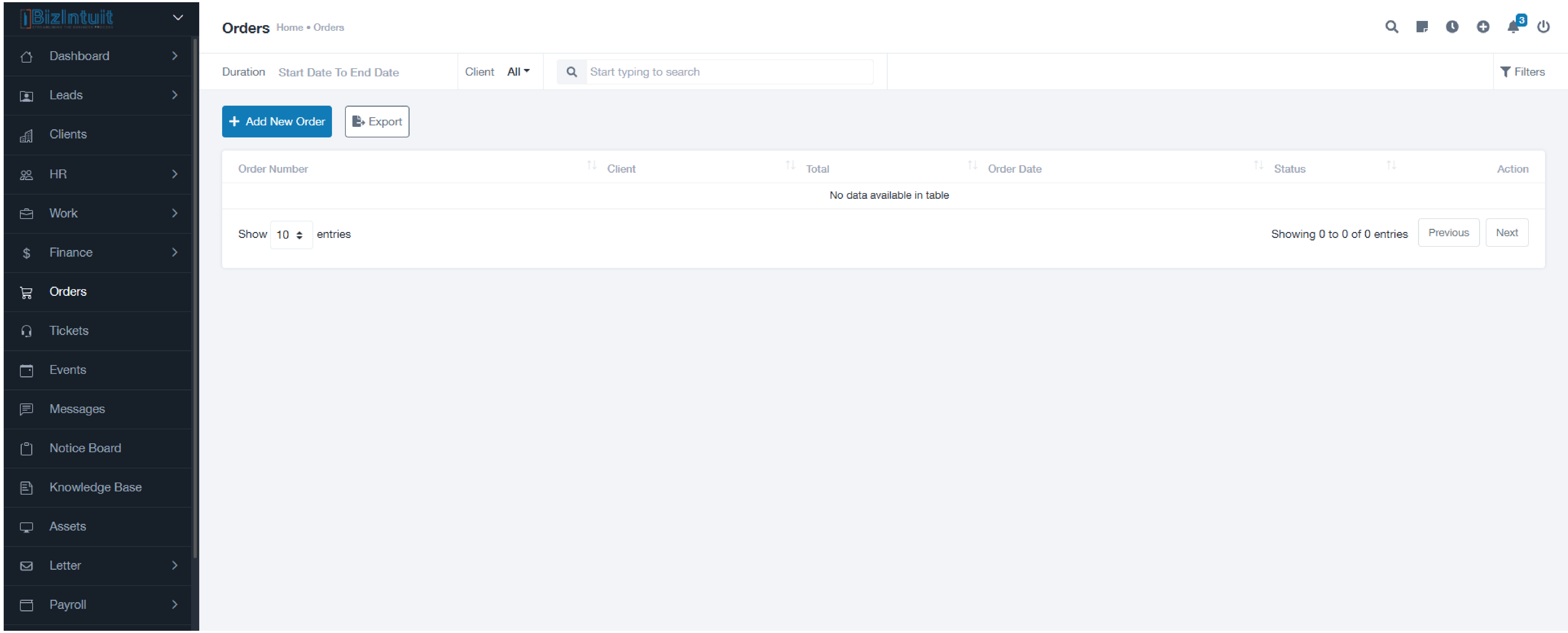
E-Invoice

you can create, send, and manage electronic invoices, ensuring compliance with digital invoicing standards. You can also track the status of e-invoices, including payments and submissions, and export e-invoice records for reporting.

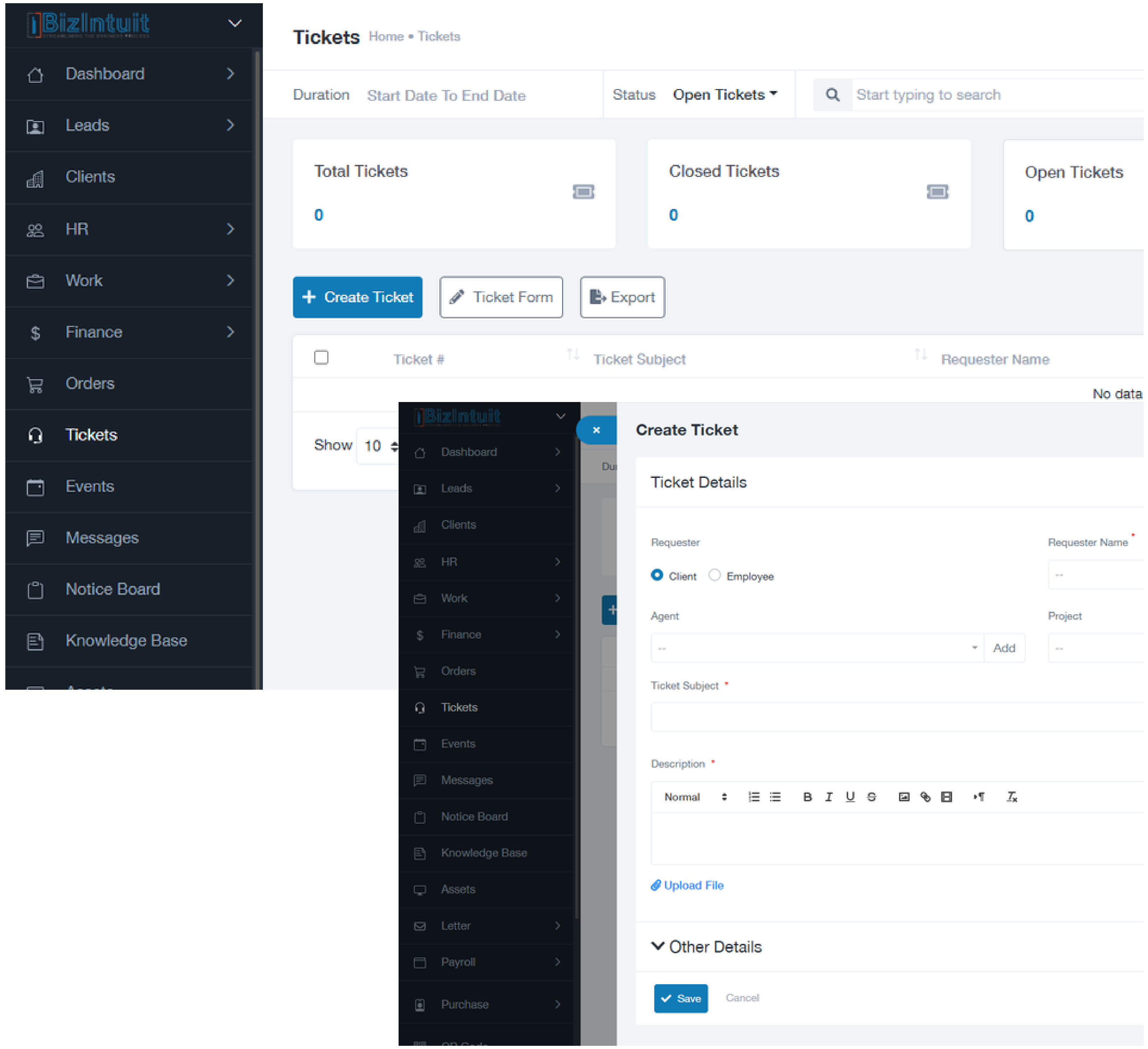


Orders

In the Orders section, you can manage customer orders, track order statuses, process order shipments, generate invoices, and export order details for inventory and financial tracking.



Tickets

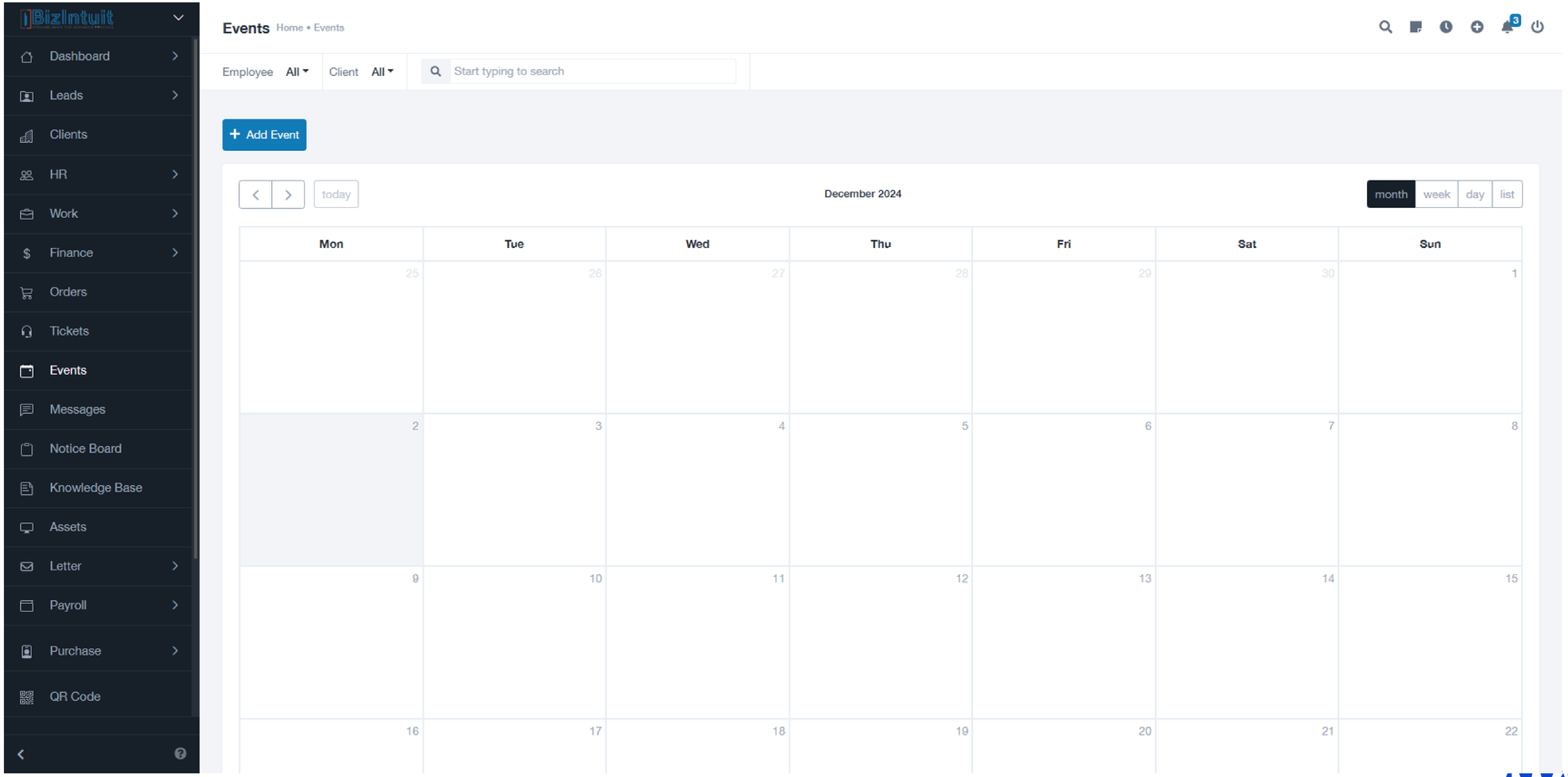


In the Tickets section, you can manage:

- Total Tickets: View all tickets submitted.
- Closed Tickets: Track tickets that have been resolved and closed.
- Open Tickets: Monitor tickets that are currently being worked on.
- Pending Tickets: See tickets awaiting action or further review.
- Resolved Tickets: Review tickets that have been addressed and resolved.

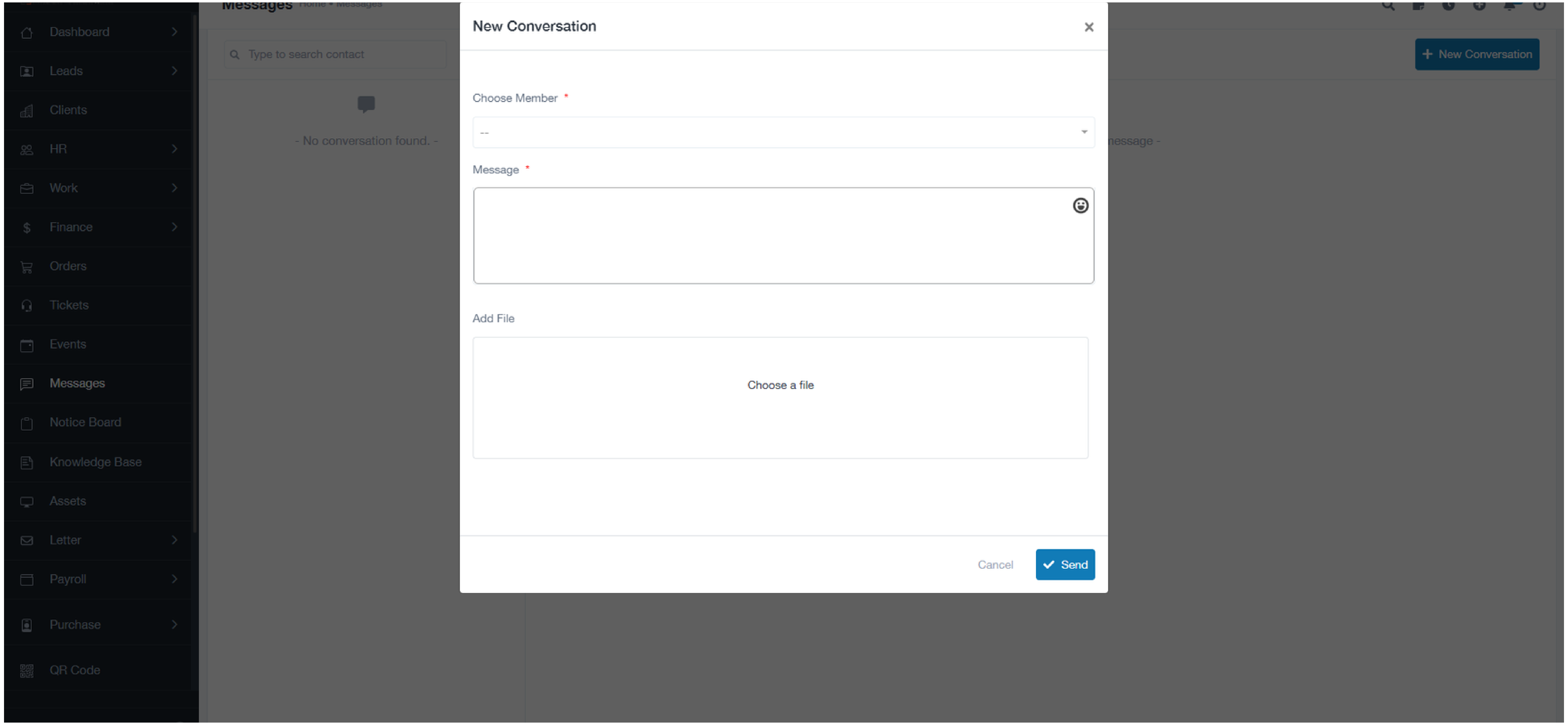
Events

In the Event section, you can create and schedule new events.Add event details such as date, time, location, and description. Export event details for reporting or analysis.



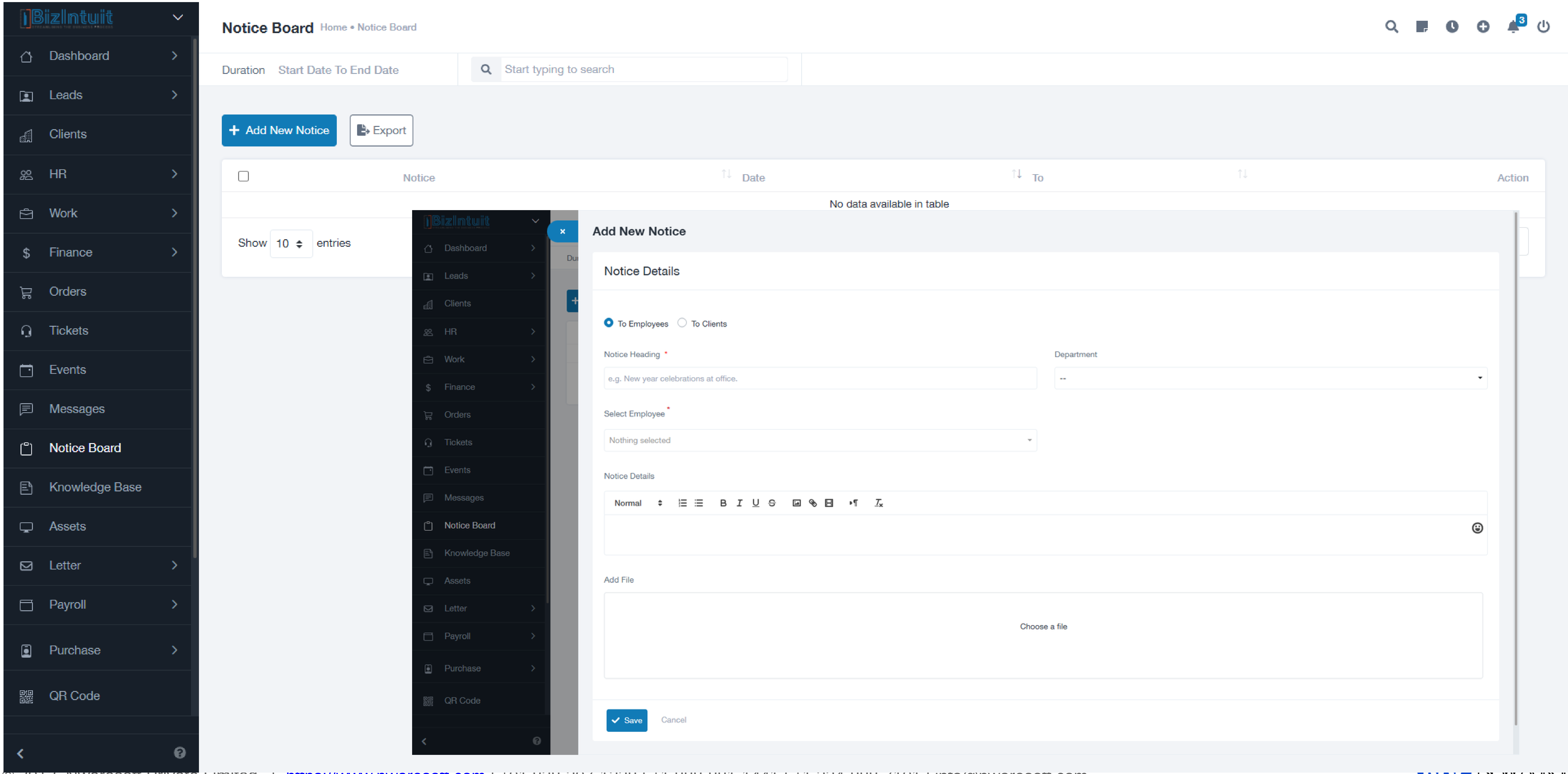
Messages

In the Messages tab, you can view all your messages and start new conversations.



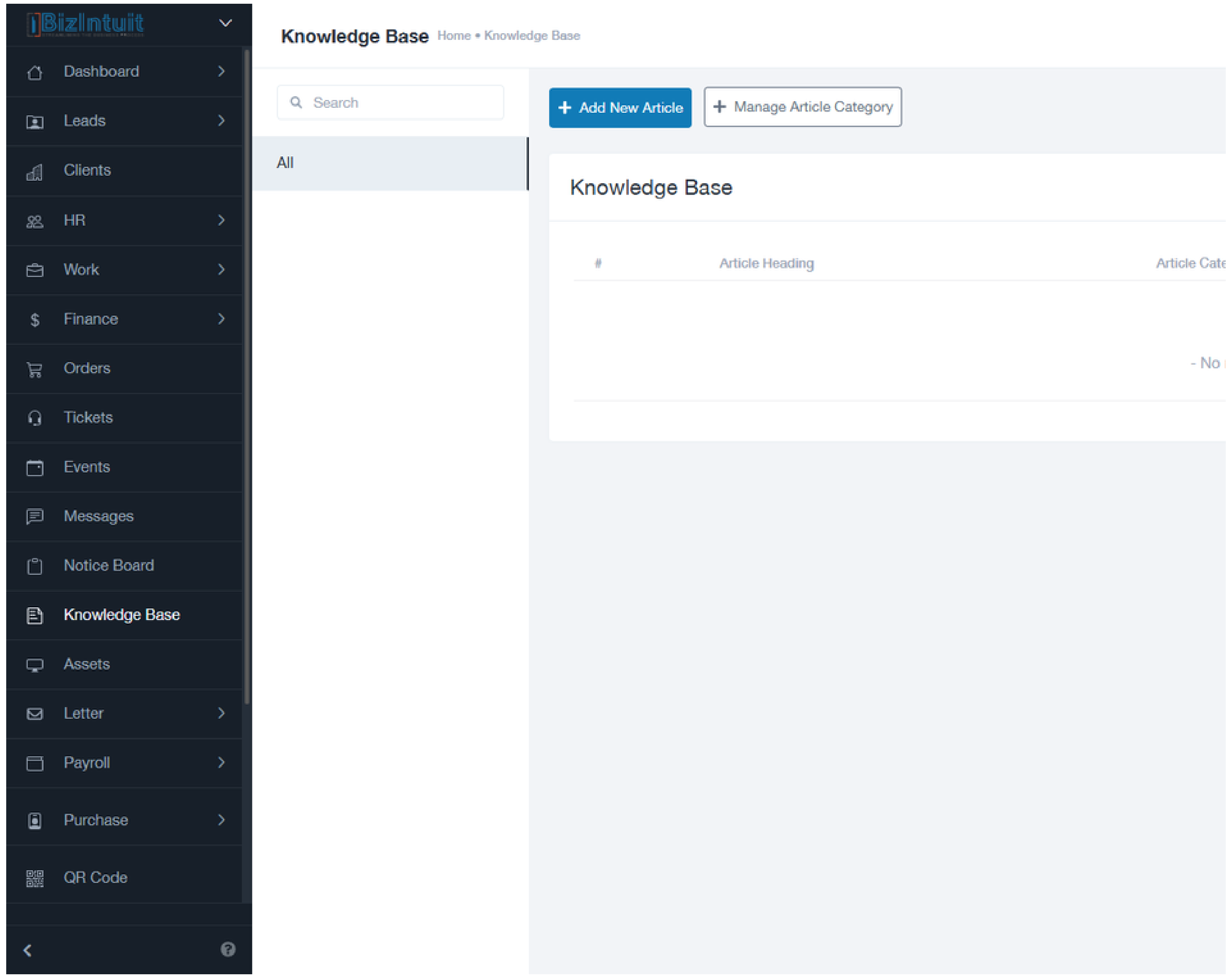
Notice Board

In the Notice Board section, you can add and export notices



Knowledge Base

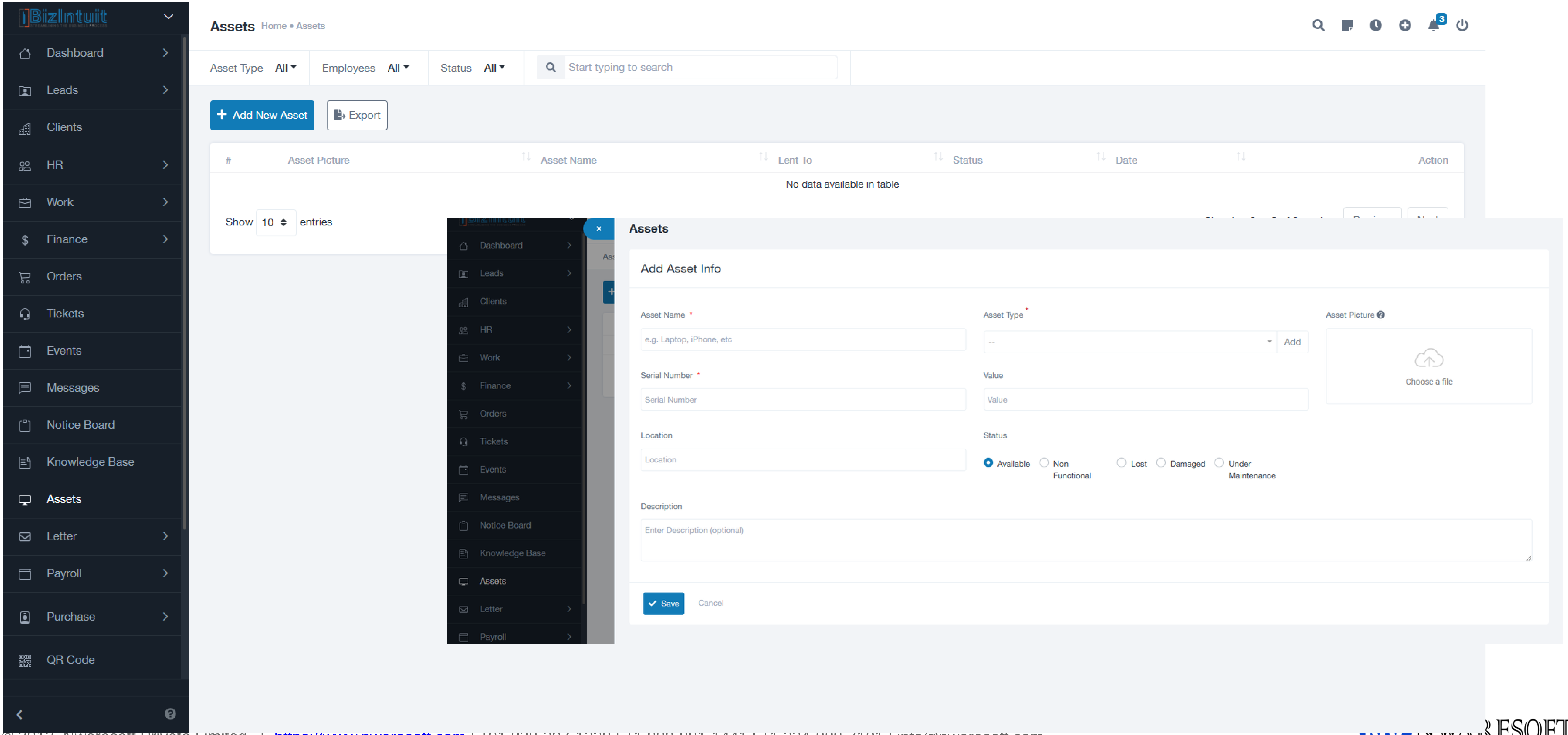
The Knowledge Base section typically serves as a repository for frequently asked questions, guides, documentation, and other useful resources.



1. Add Knowledge Base Articles: Create and add articles that contain important information, FAQs, or tutorials for users.
2. Categories & Tags: Organize articles by categories or tags for easy navigation.
3. Search Function: Allow users to search for specific topics or solutions within the knowledge base.
4. Update & Edit: Modify existing articles as needed to keep the information current.
5. Export: Option to export knowledge base content for offline access or reporting.

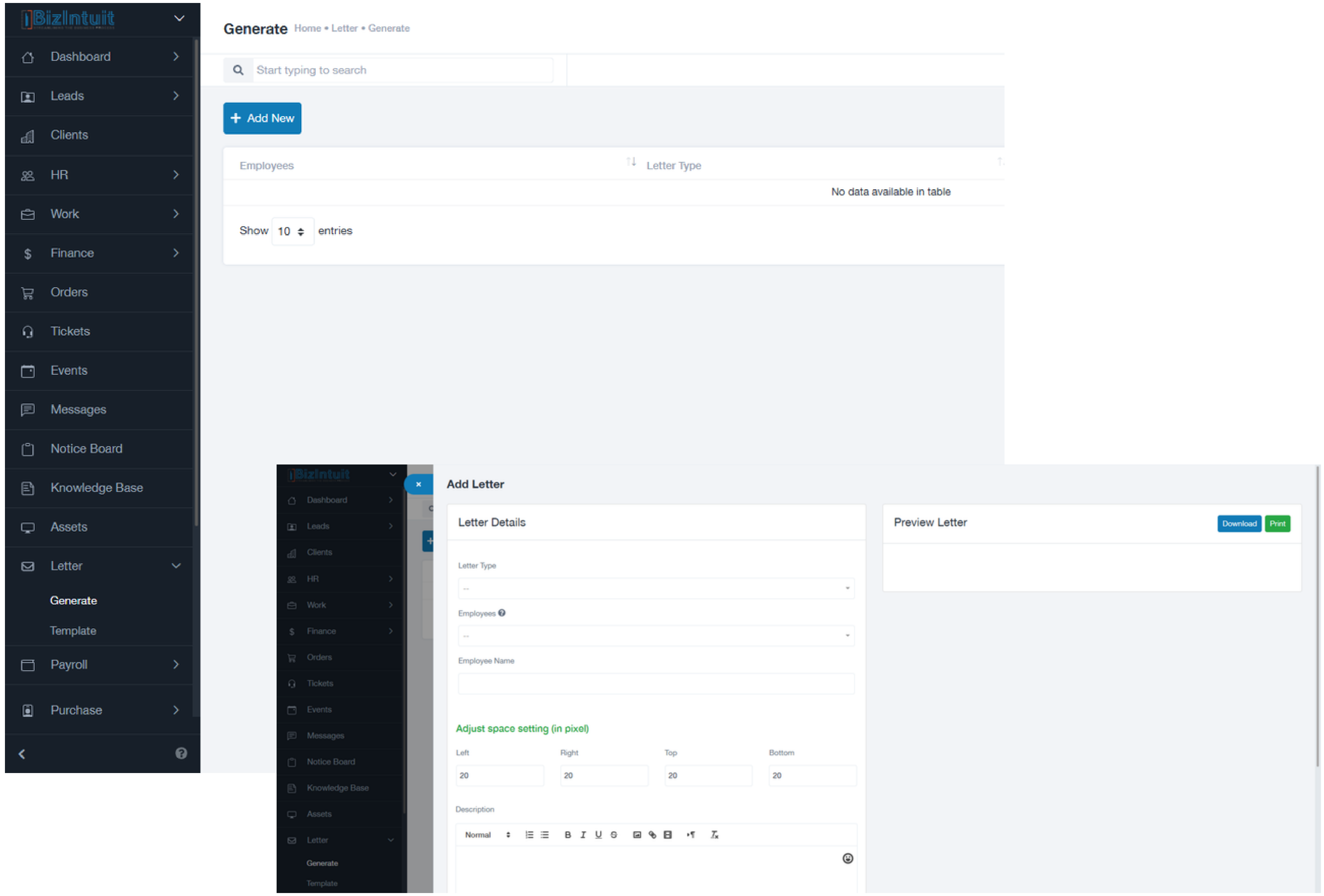
Assets

In the Assets section, you can add assets.



Letter

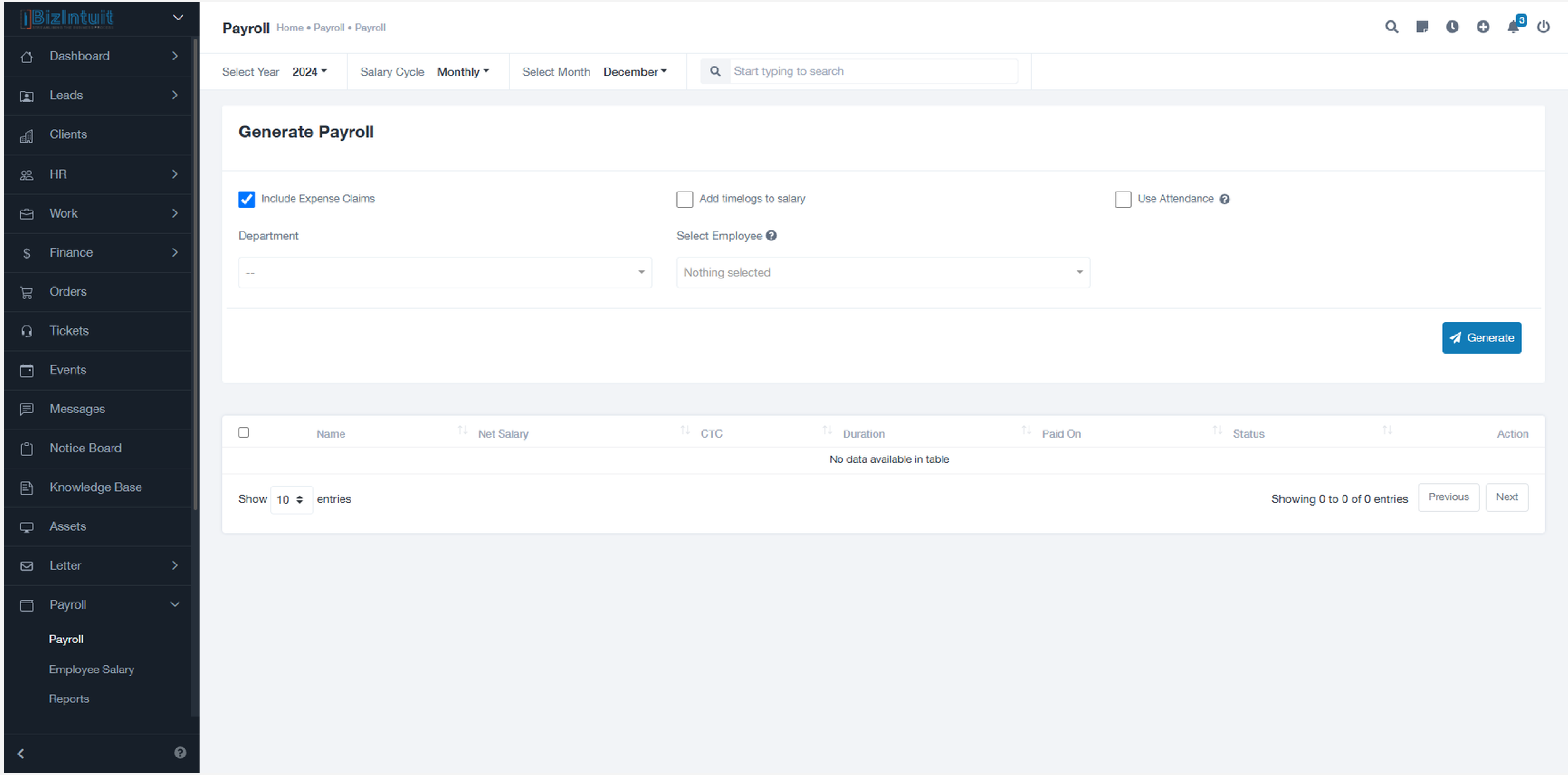
The Letter section typically involves creating formal communication templates, such as business letters, notices, or any other type of letter.



Here's how this could work:

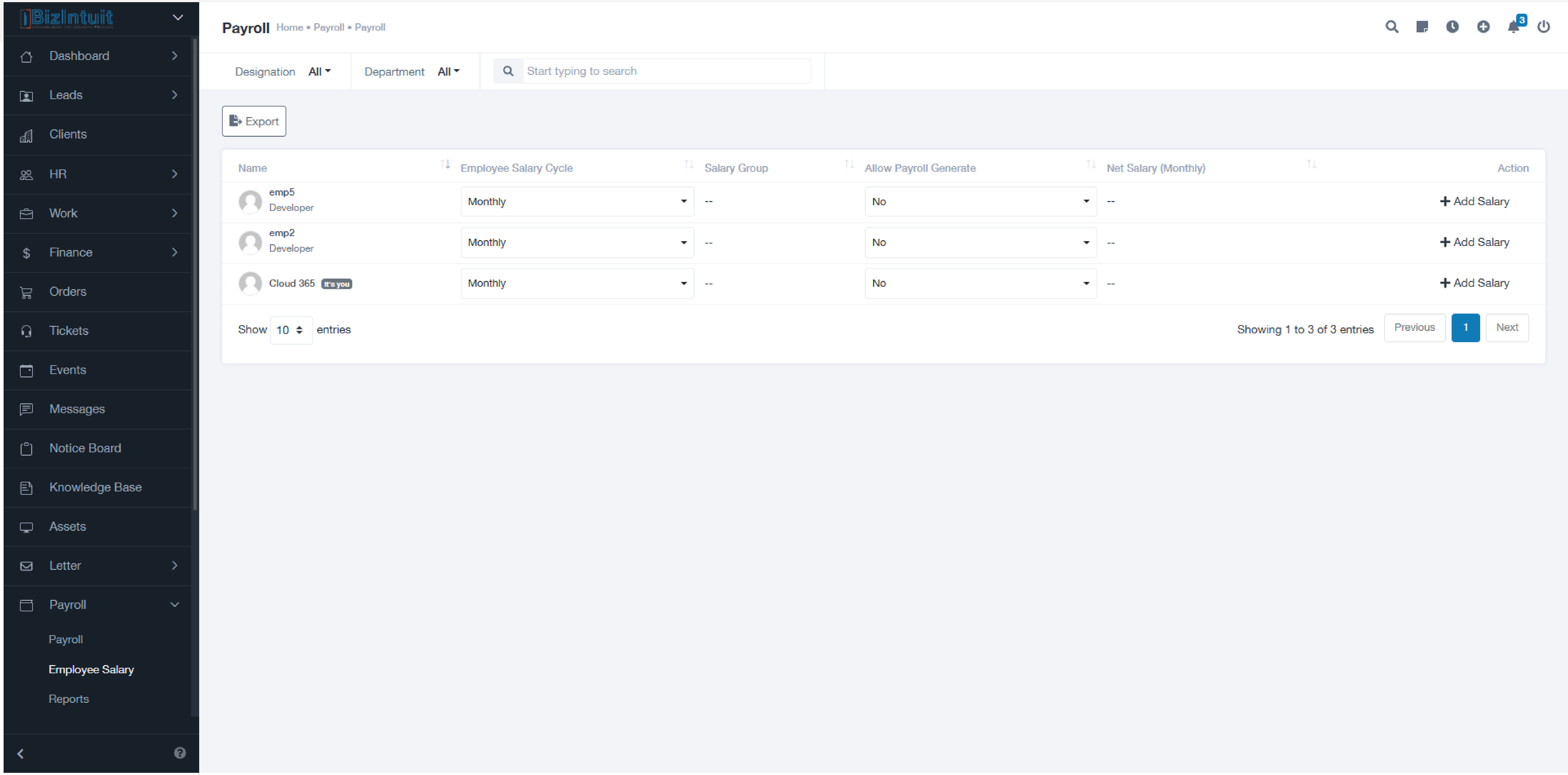
- Generate Letter: Create custom letters based on predefined templates or from scratch.
- Templates: Use or design templates for different types of letters (e.g., official correspondence, invitations, etc.).

Payroll


BizIntuit
Dashboard
Leads
Clients
HR
Work
Finance
Orders
Tickets
Events
Messages
Notice Board
Knowledge Base
Assets
Letter
Payroll
Payroll
Employee Salary
Reports
Payroll
Home • Payroll • Payroll
Select Year 2024
Salary Cycle Monthly
Select Month December
Start typing to search
Generate Payroll
Include Expense Claims
Add timelogs to salary
Use Attendance
Department
--
Select Employee
Nothing selected
Generate
Name
Net Salary
CTC
Duration
Paid On
Status
Action
No data available in table
Show 10 entries
Showing 0 to 0 of 0 entries
Previous
Next

Payroll - Salary

Employee Salary

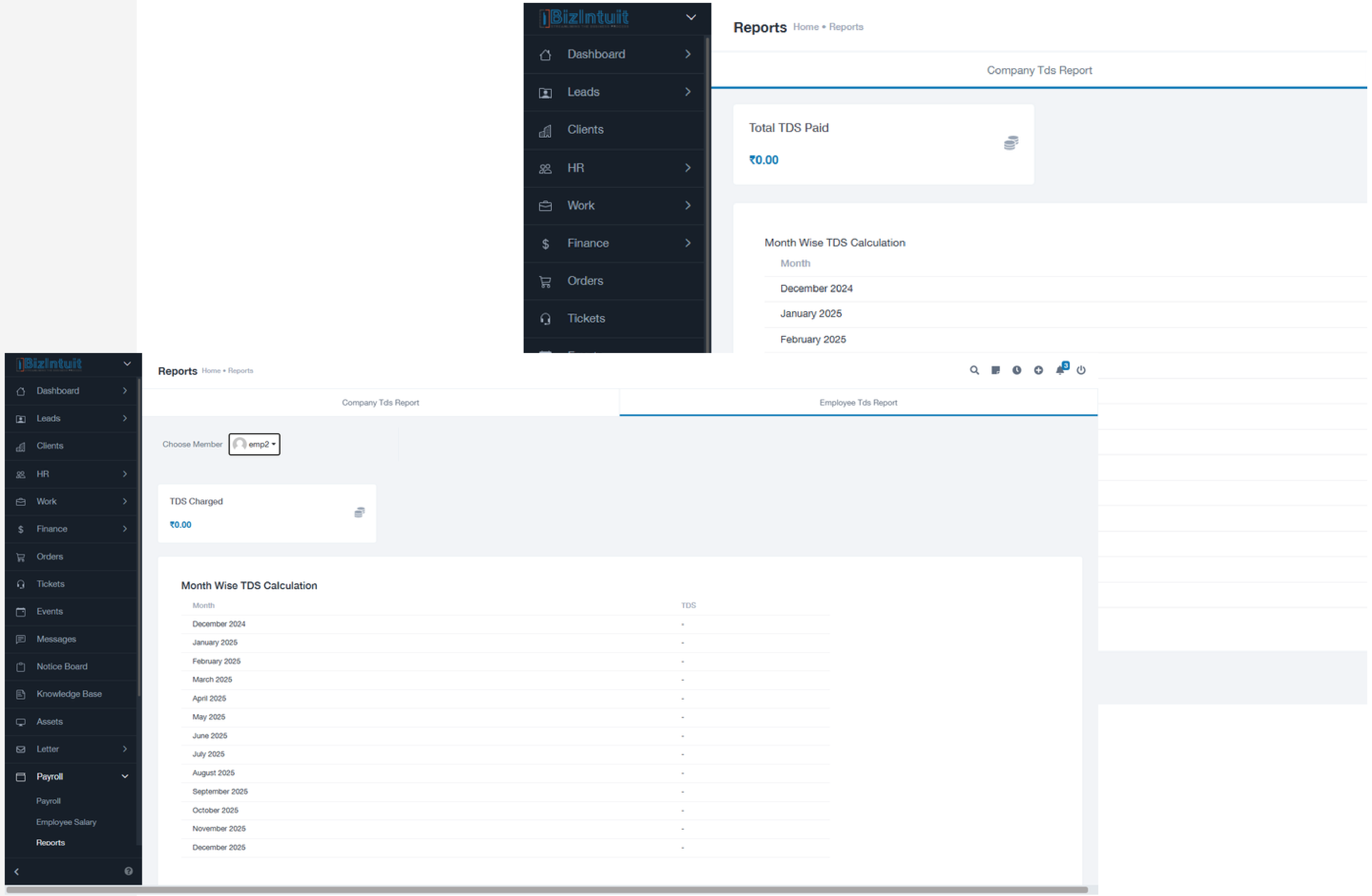


Payroll - Report

Under the Payroll section, you have two types of reports:

- Company TDS Report: This report includes the Tax Deducted at Source (TDS) details for the company, reflecting the taxes withheld from employee salaries and paid to the government.

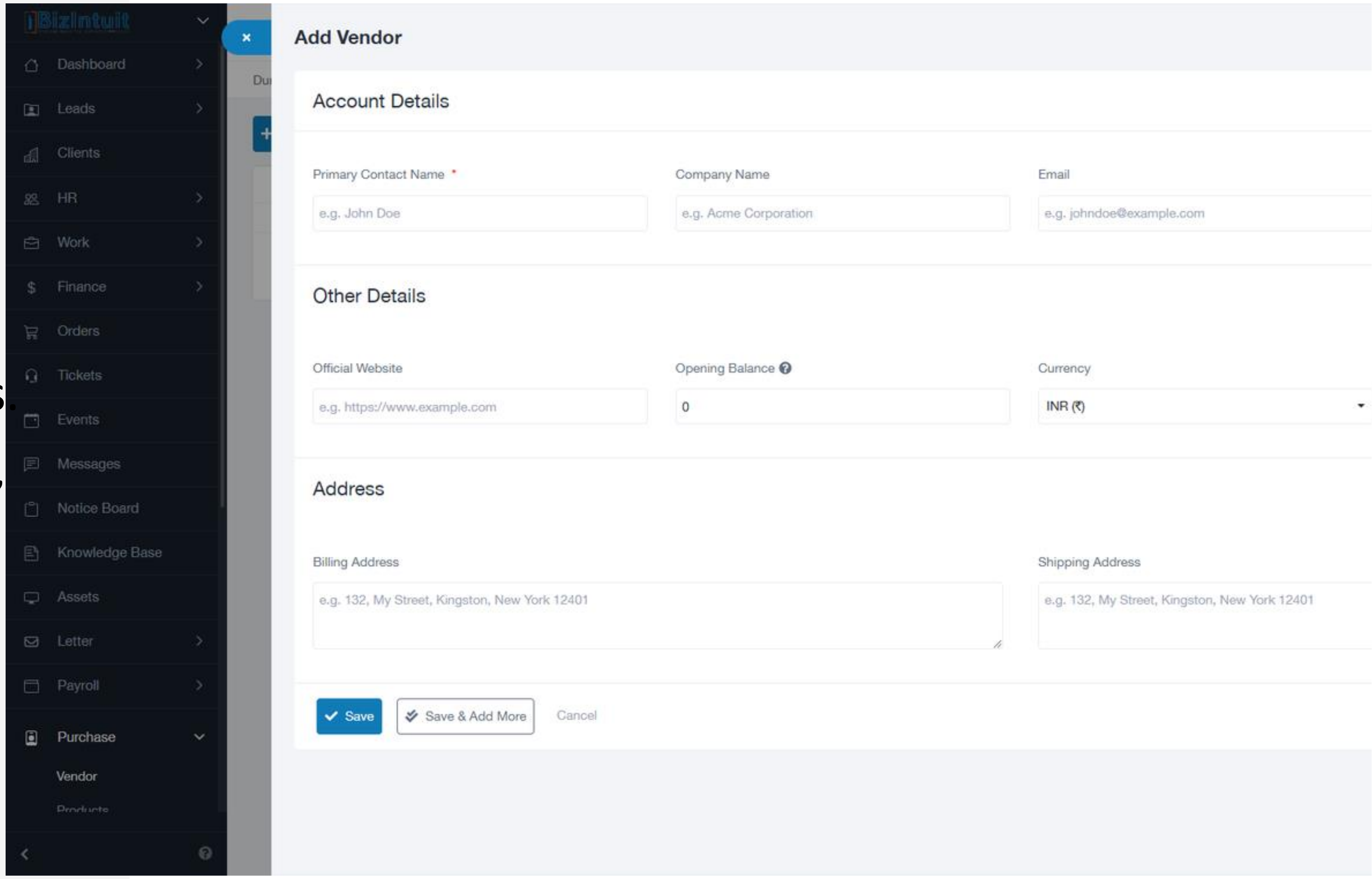
- Employee Report: This report provides salary and payroll details for individual employees, including deductions, bonuses, and tax-related information.



Purchase

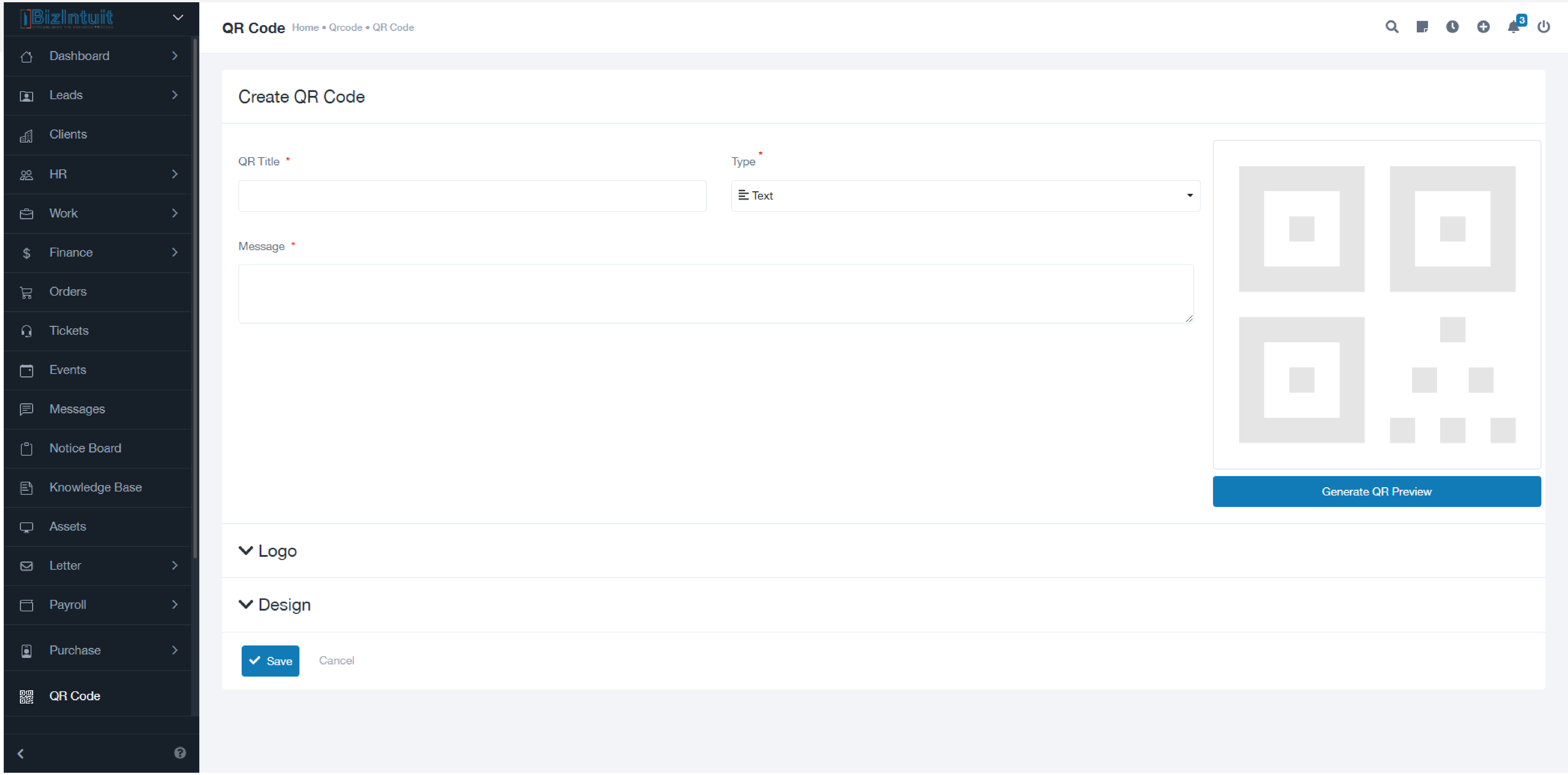
Under the Purchase section, you can manage the following:

- Vendor: Add and manage vendor details.
- Products: Track and manage the products you purchase.
- Purchase Order: Create and manage purchase orders.
- Bills: Record and track bills for purchased products.
- Vendor Payments: Manage payments made to vendors.
- Vendor Credits: Track credits issued by vendors.
- Inventory: Keep track of product stock and inventory levels.
- Reports: Generate reports related to purchases, payments, and inventory.



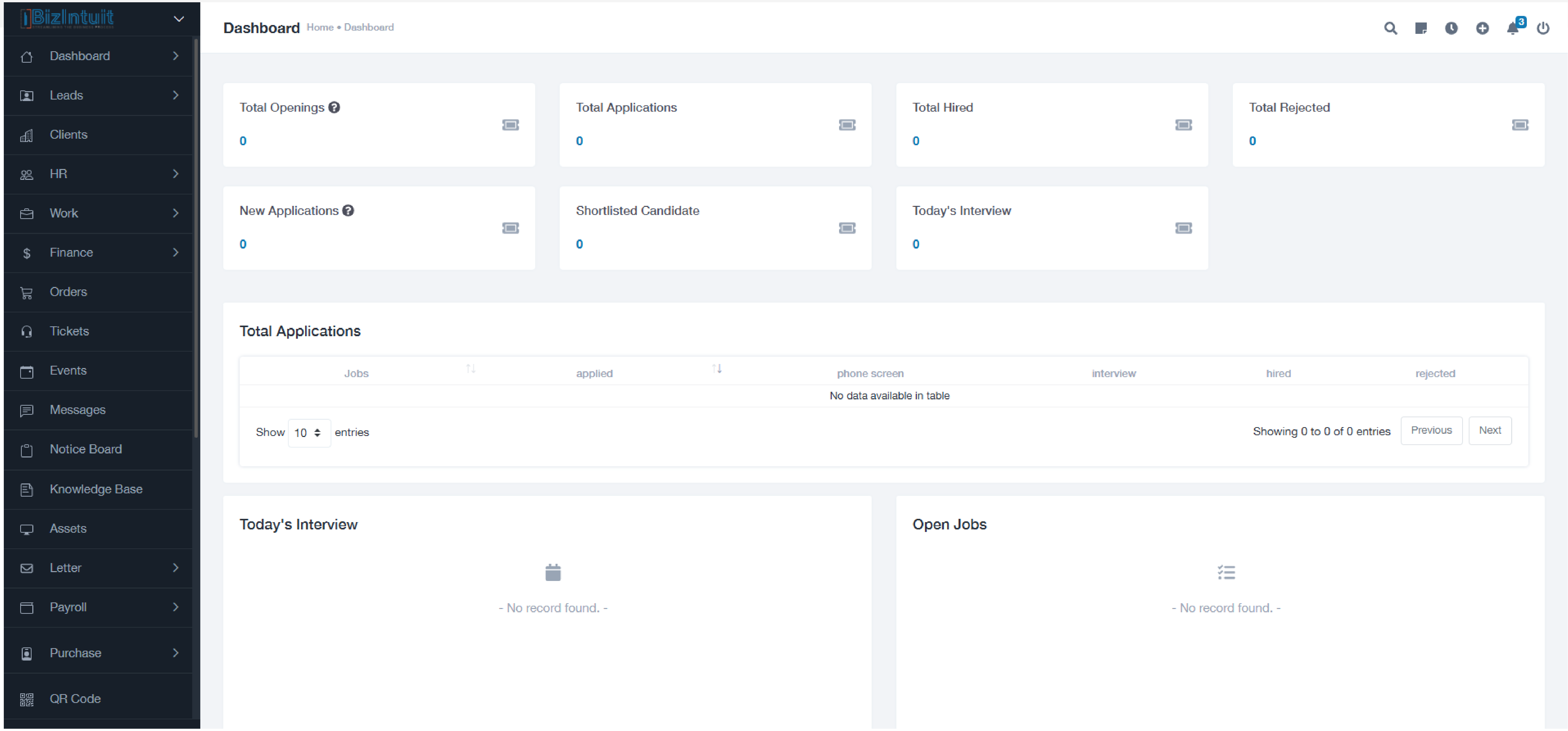
QR Code

Under the QR Code section, you can create QR codes for various purposes, such as for business information, URLs, product details, or any custom data. These QR codes can be generated, customized, and exported as needed.



Recruit

Under the Recruit section, you can manage the following:



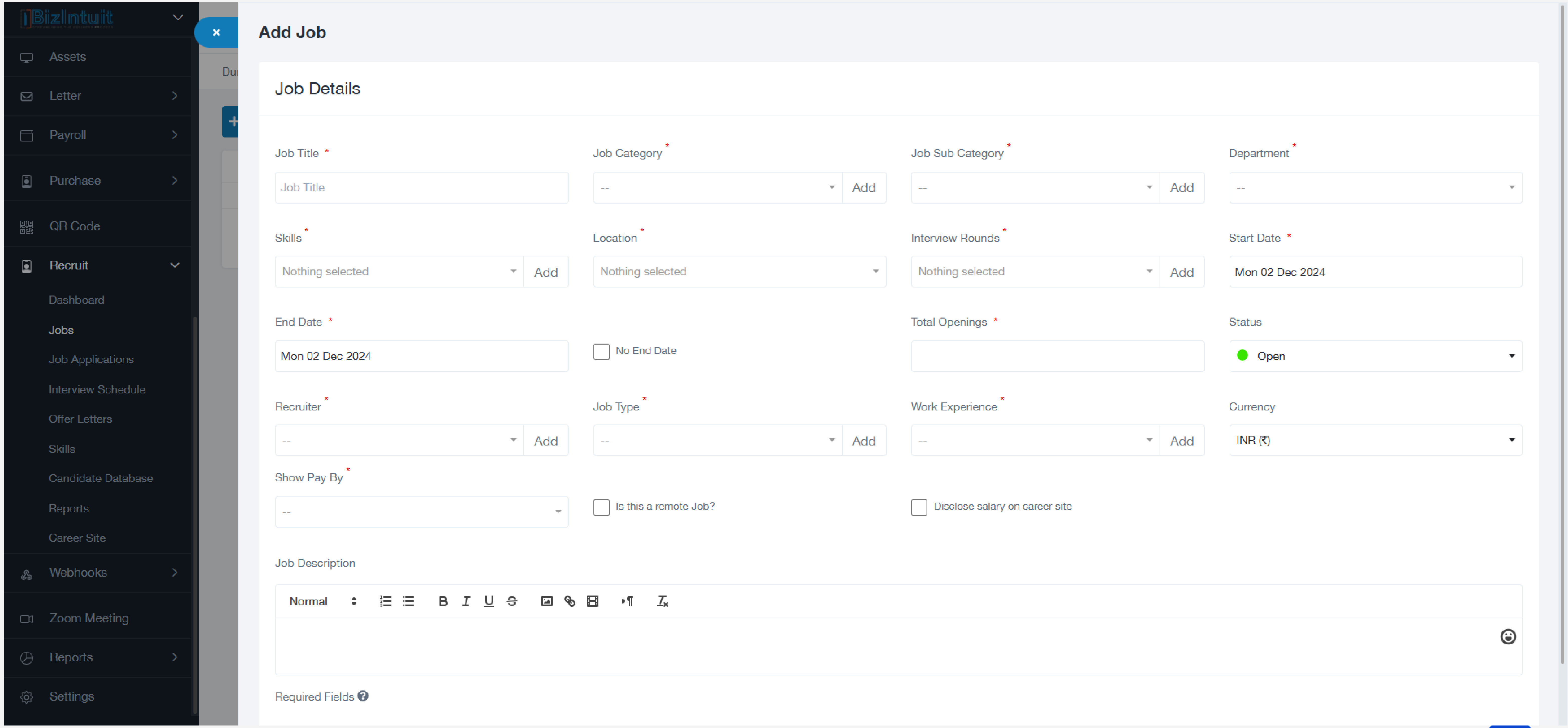
Recruit

Under the Recruit section, you can manage the following:

- Dashboard: Overview of recruitment activities and metrics.
- Jobs: Create and manage job listings.
- Job Applications: View and manage candidate applications for posted jobs.
- Interview Schedule: Organize and track interview schedules for candidates.
- Offer Letters: Create and manage offer letters for selected candidates.
- Skills: Manage required skills and qualifications for job roles.
- Candidate Database: Store and organize candidate profiles and details.
- Reports: Generate recruitment-related reports and analytics.
- Career Site: Manage and customize the career page for job postings.

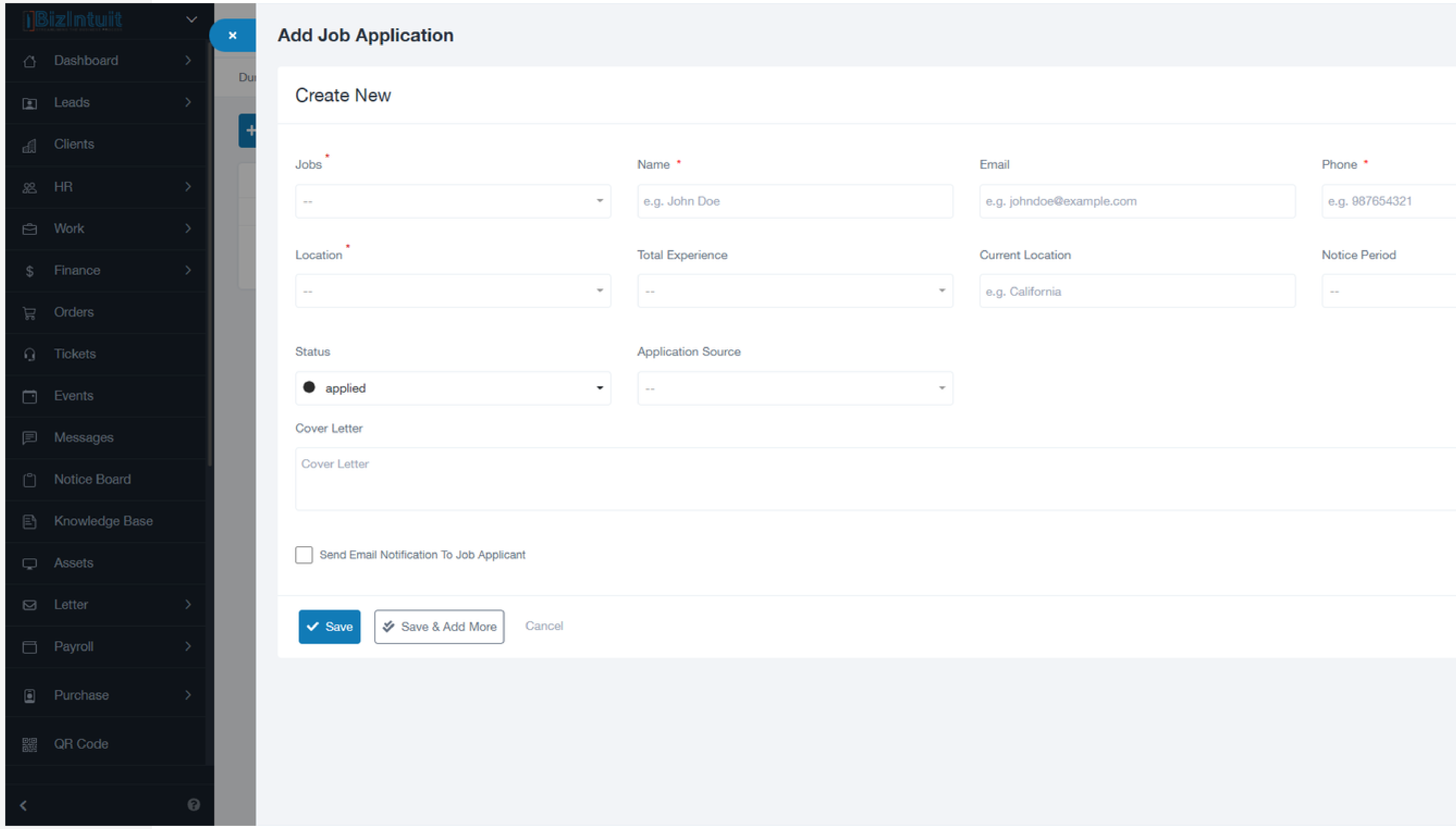
Recruit - Job

You can add new job postings for different departments. Specify job details such as title, description, skills, qualifications, & department assignment to streamline the recruitment process.



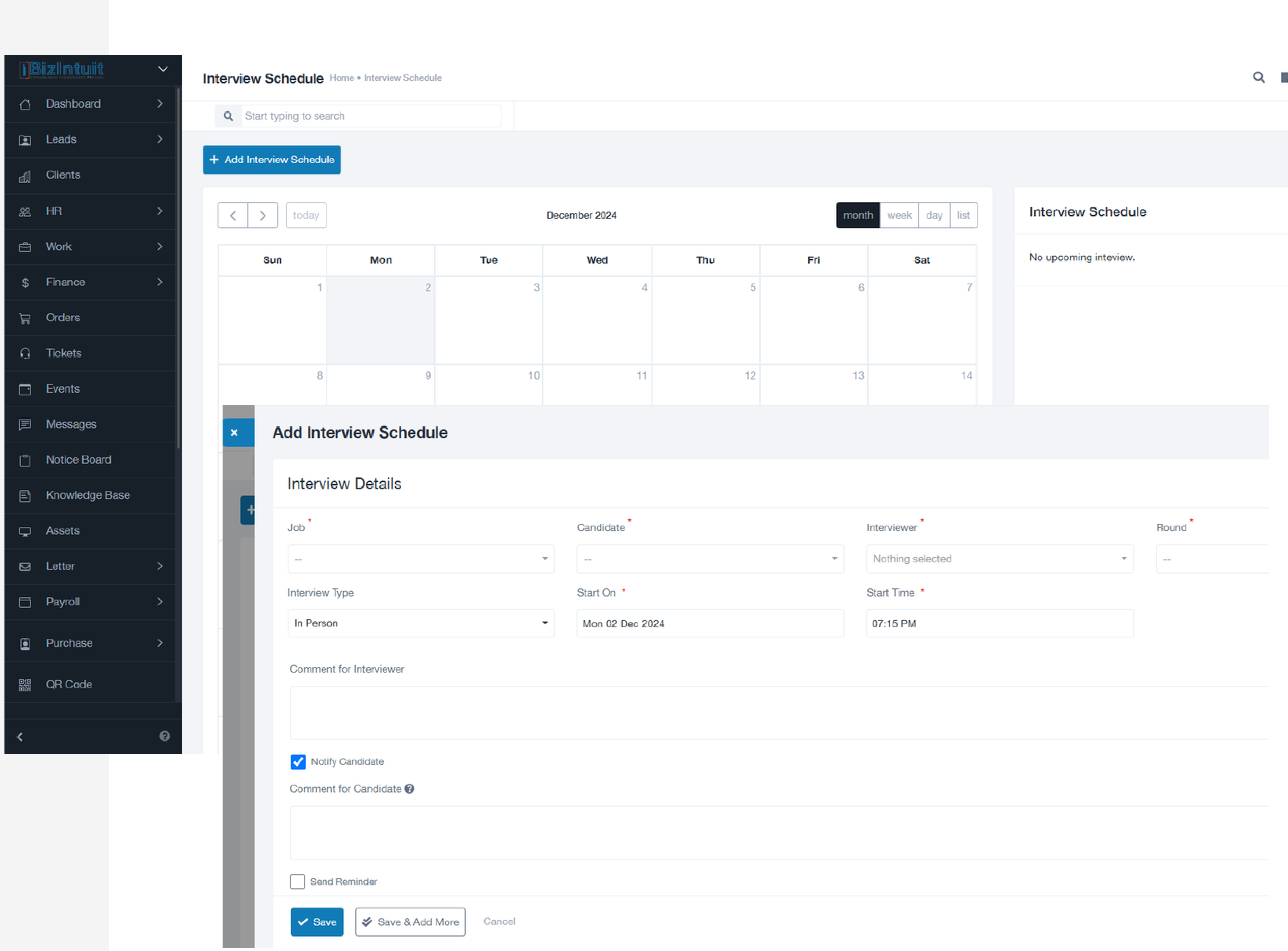
Recruit - Job Appications

- View and track applications submitted for various job postings.
- Review candidate profiles, resumes, and cover letters.
- Update the status of applications (e.g., shortlisted, interviewed, rejected, or hired).
- Communicate with candidates regarding their application status.
- Organize and filter applications based on job roles, departments, or statuses for efficient management.

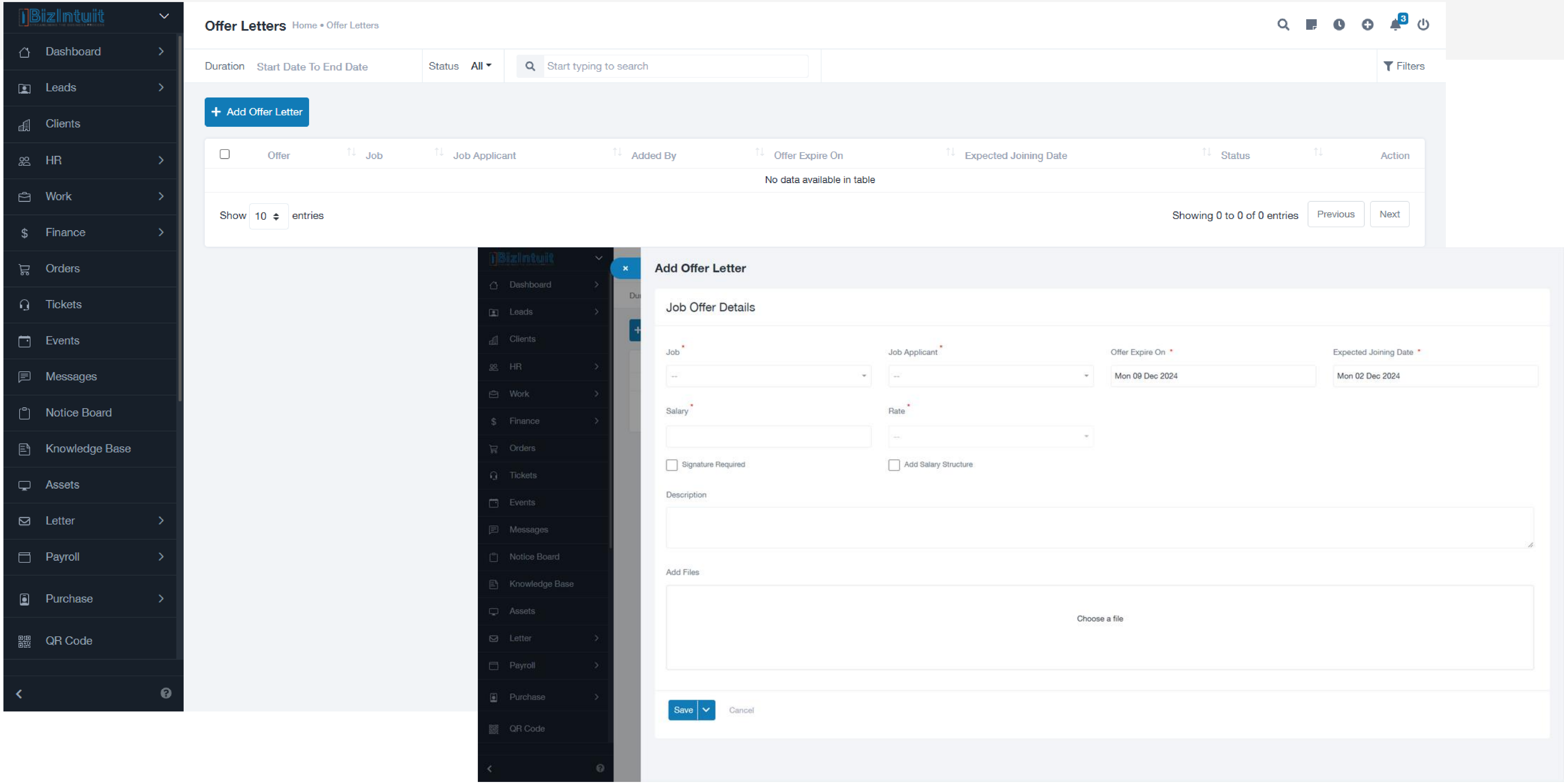


Recruit - Interview Schedule

- Schedule interviews for candidates with specific time slots and interviewers.
- Notify candidates and interviewers about the scheduled interviews via email or notifications.
- Track upcoming and completed interviews in a calendar or list view.
- Record interview feedback and update the candidate's application status accordingly.
- Reschedule or cancel interviews as needed with automatic notifications.

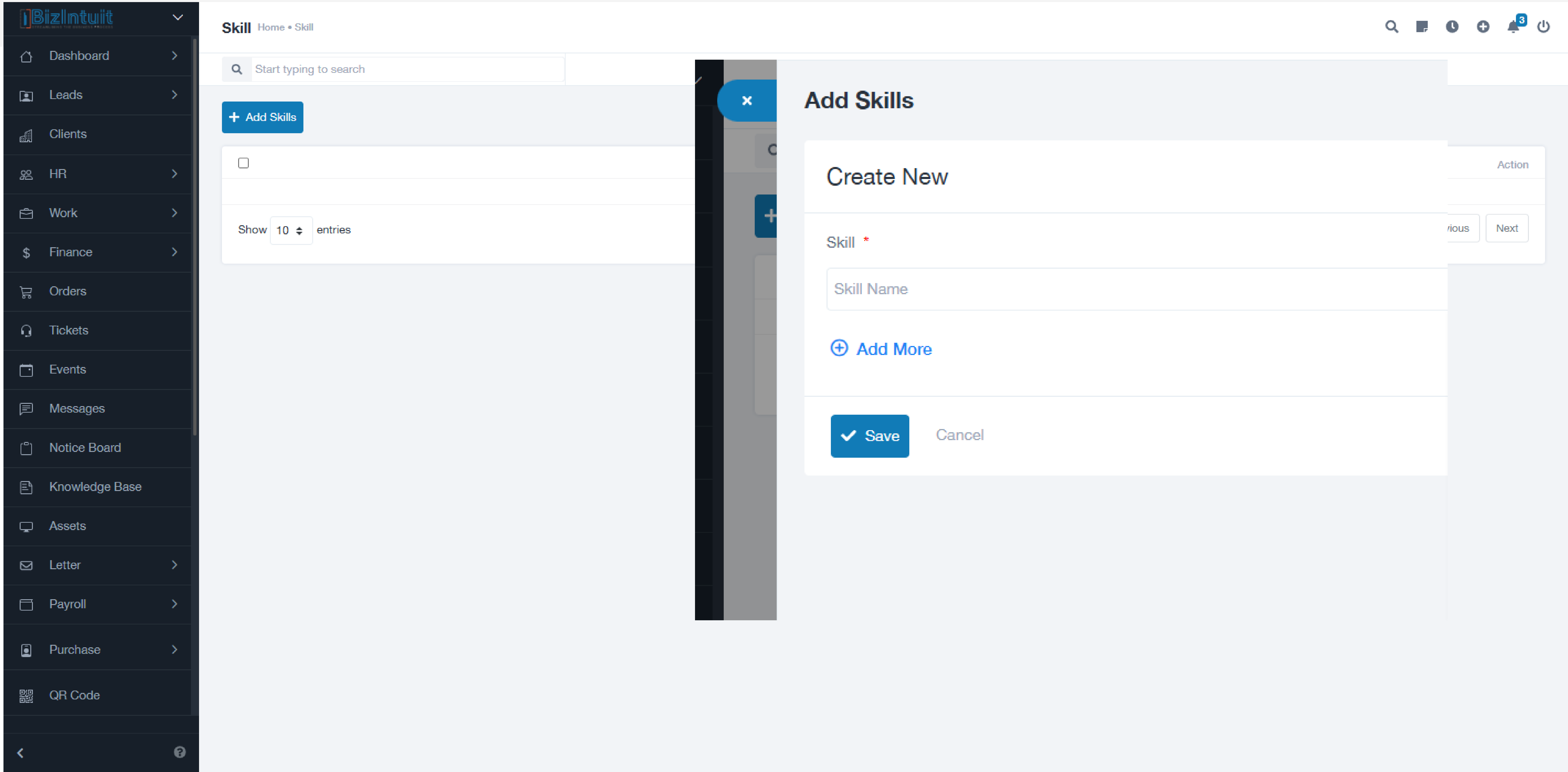


Recruit - Offer Letters



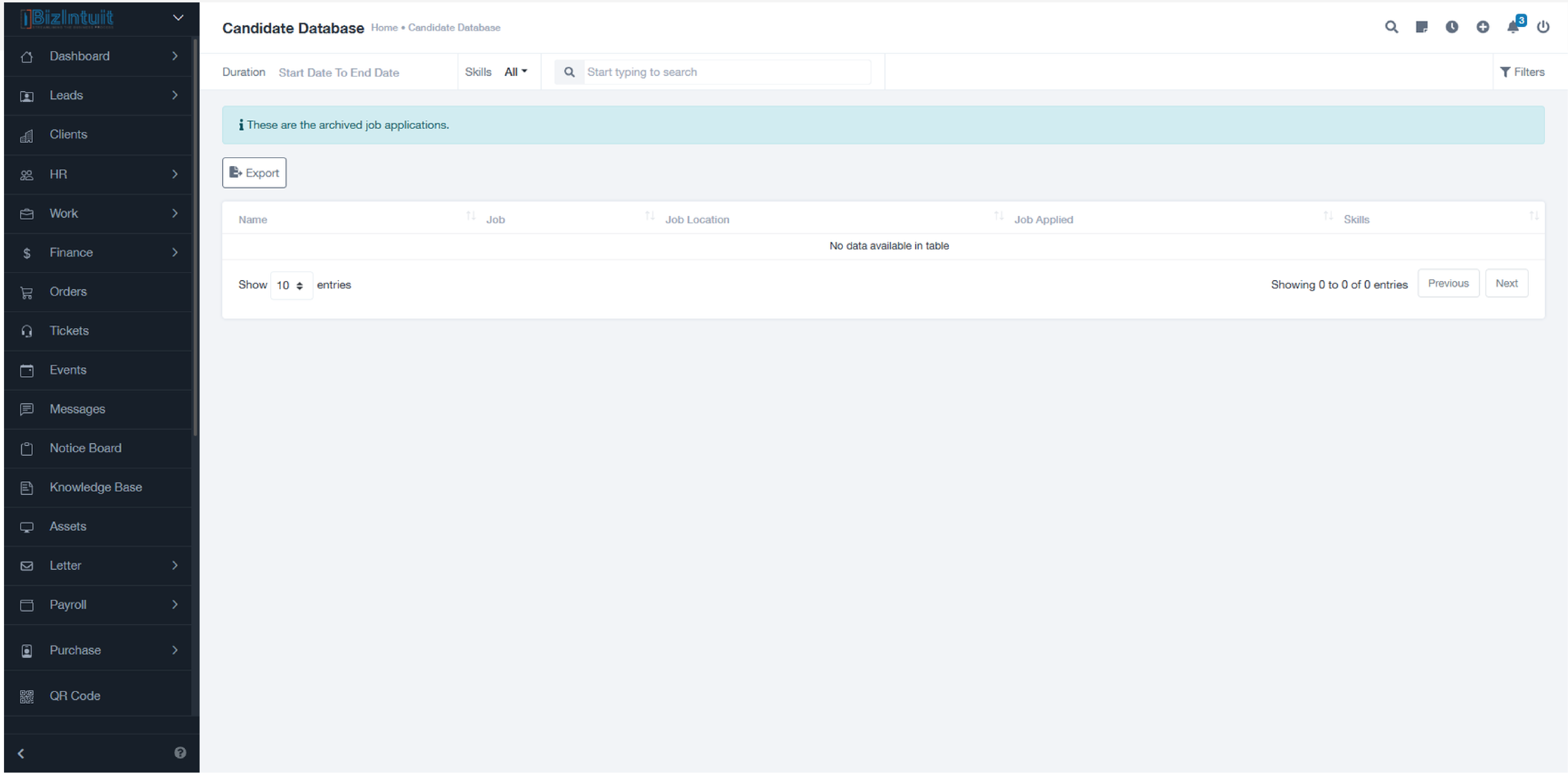
Recruit - Skills

Add and manage a list of skills required for various job roles.



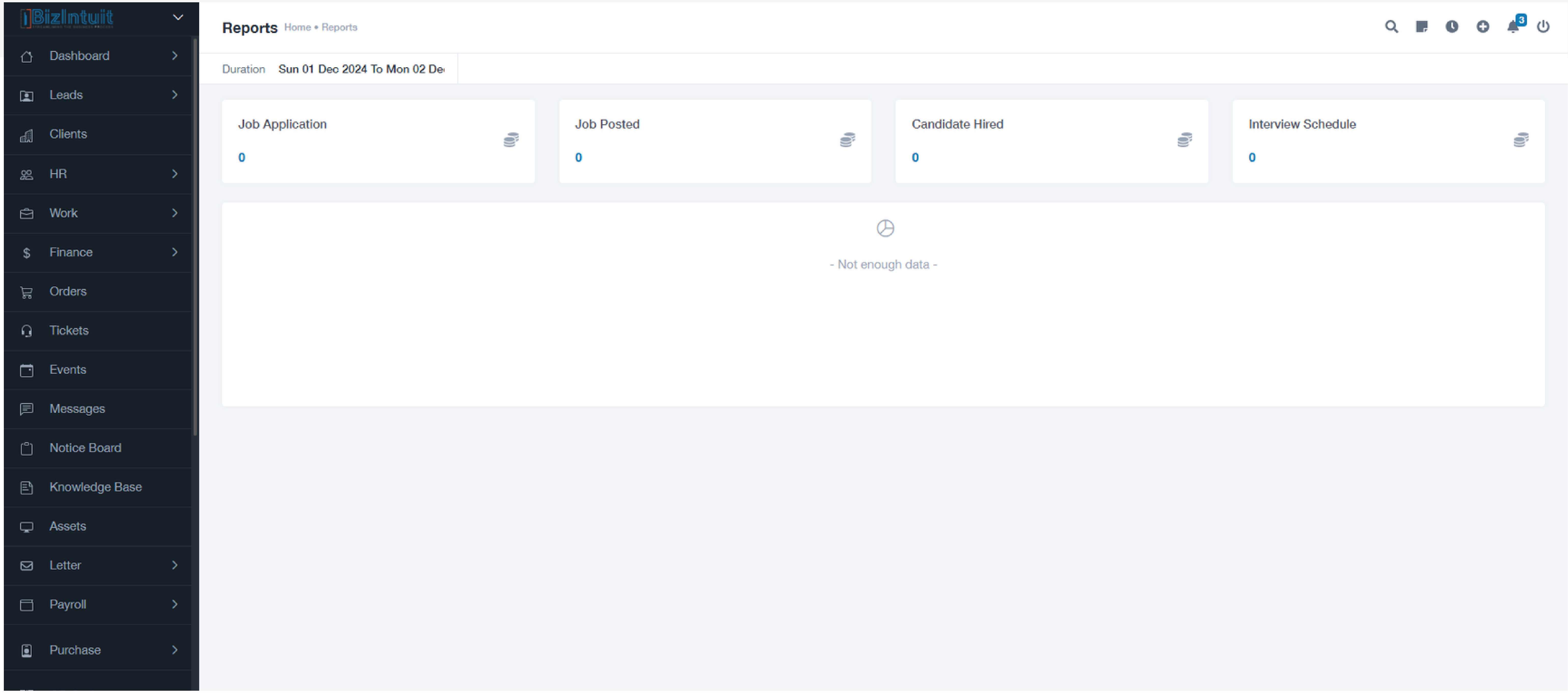
Recruit - Candidate Database

Manage the Candidate Database and export it as a spreadsheet.



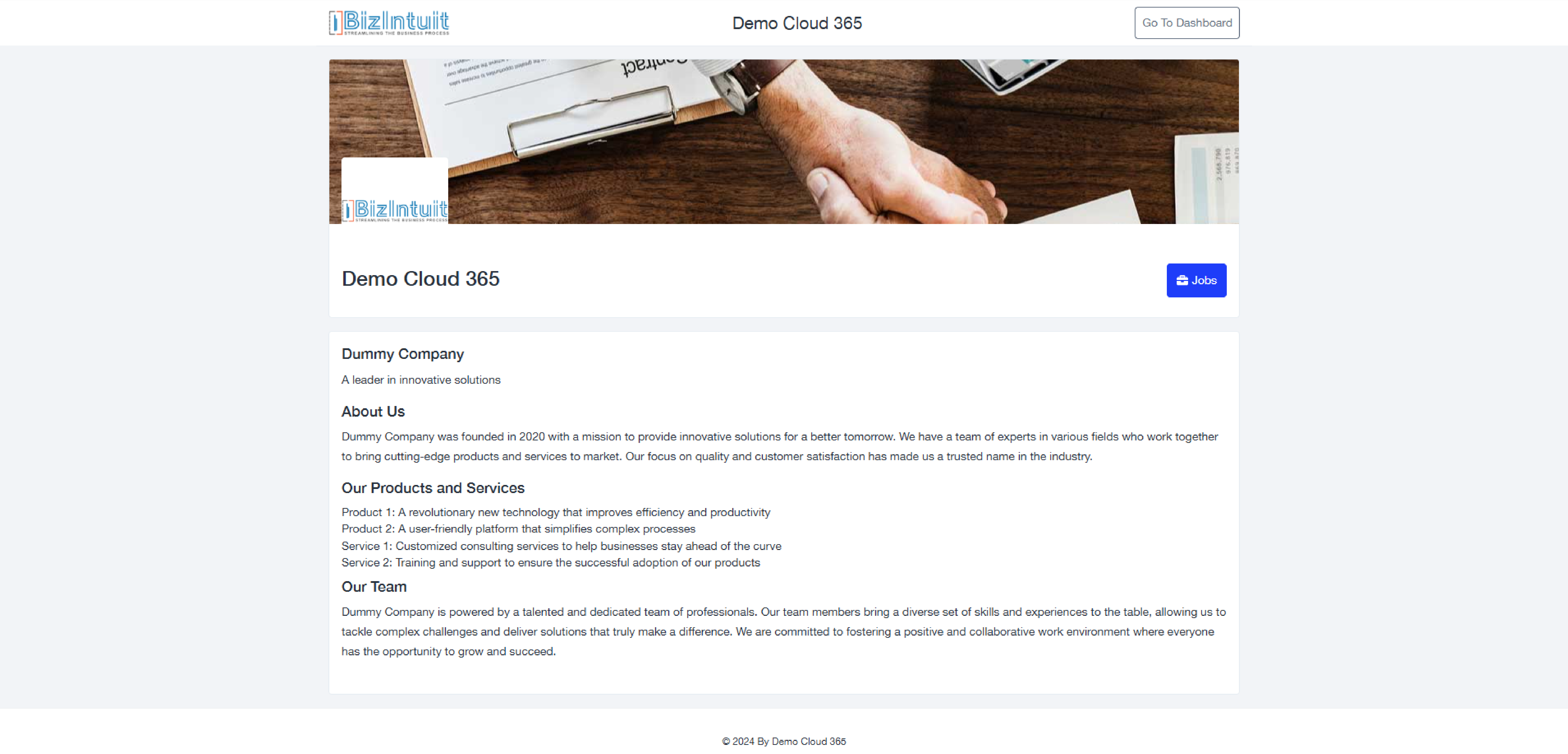
Recruit - Report

Generate reports for all job applications, providing insights into application statuses, candidate progress, and recruitment metrics.



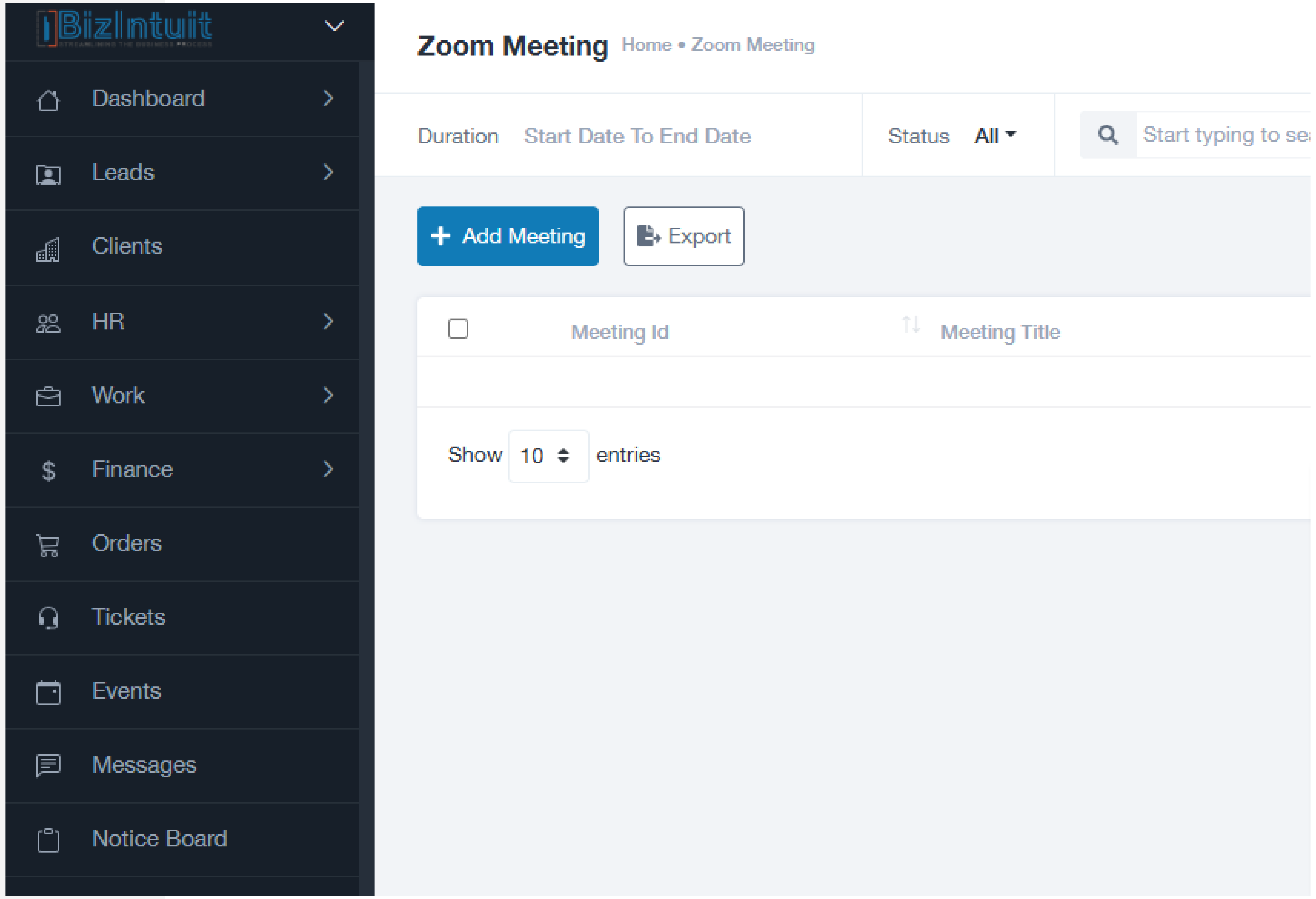
Recruit - Career Site

You can create and manage a career site for job postings, showcasing open positions and allowing candidates to apply directly.



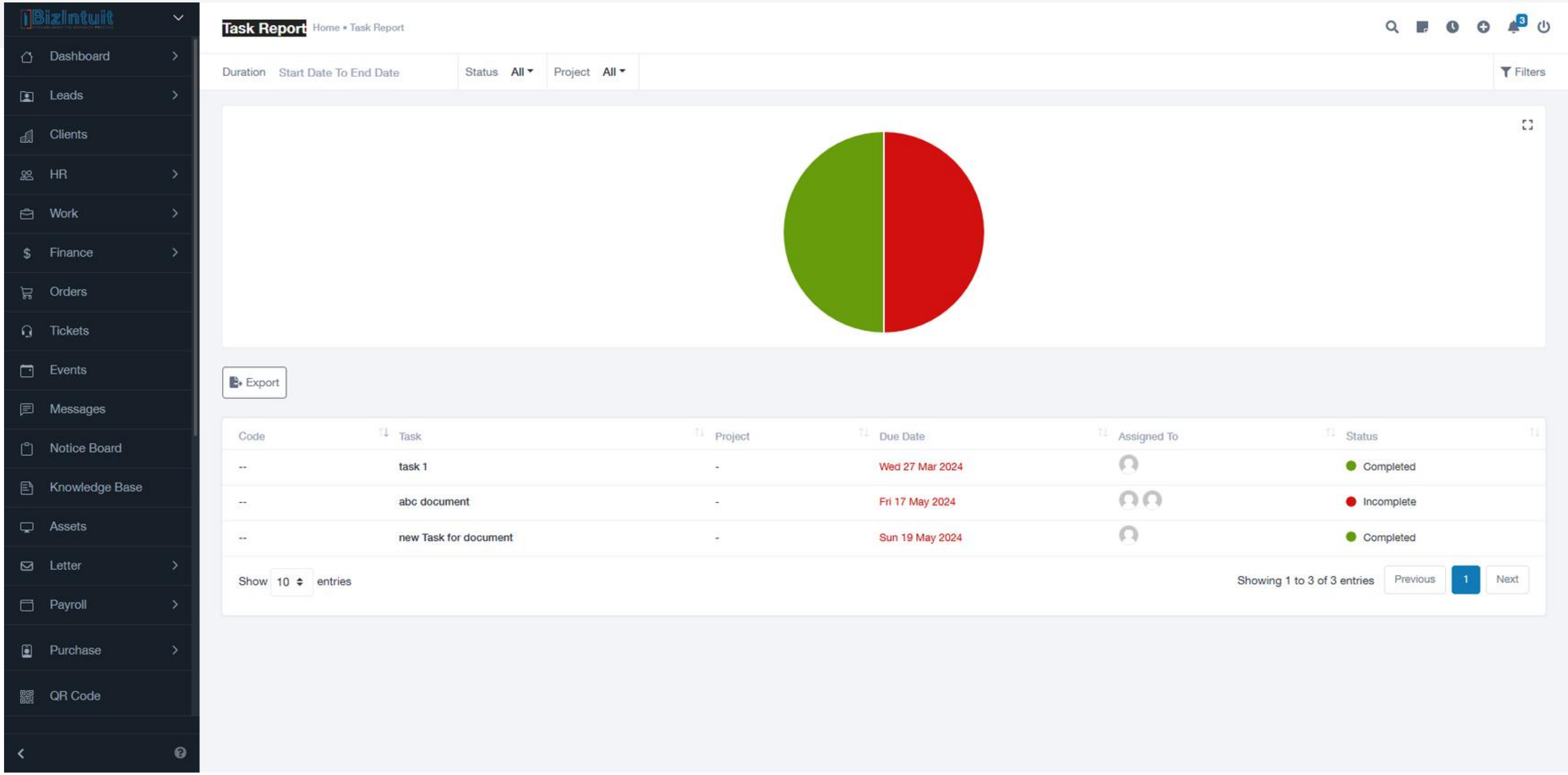
Zoom Meeting

You can schedule and manage Zoom meetings for interviews or discussions with candidates directly within the system.



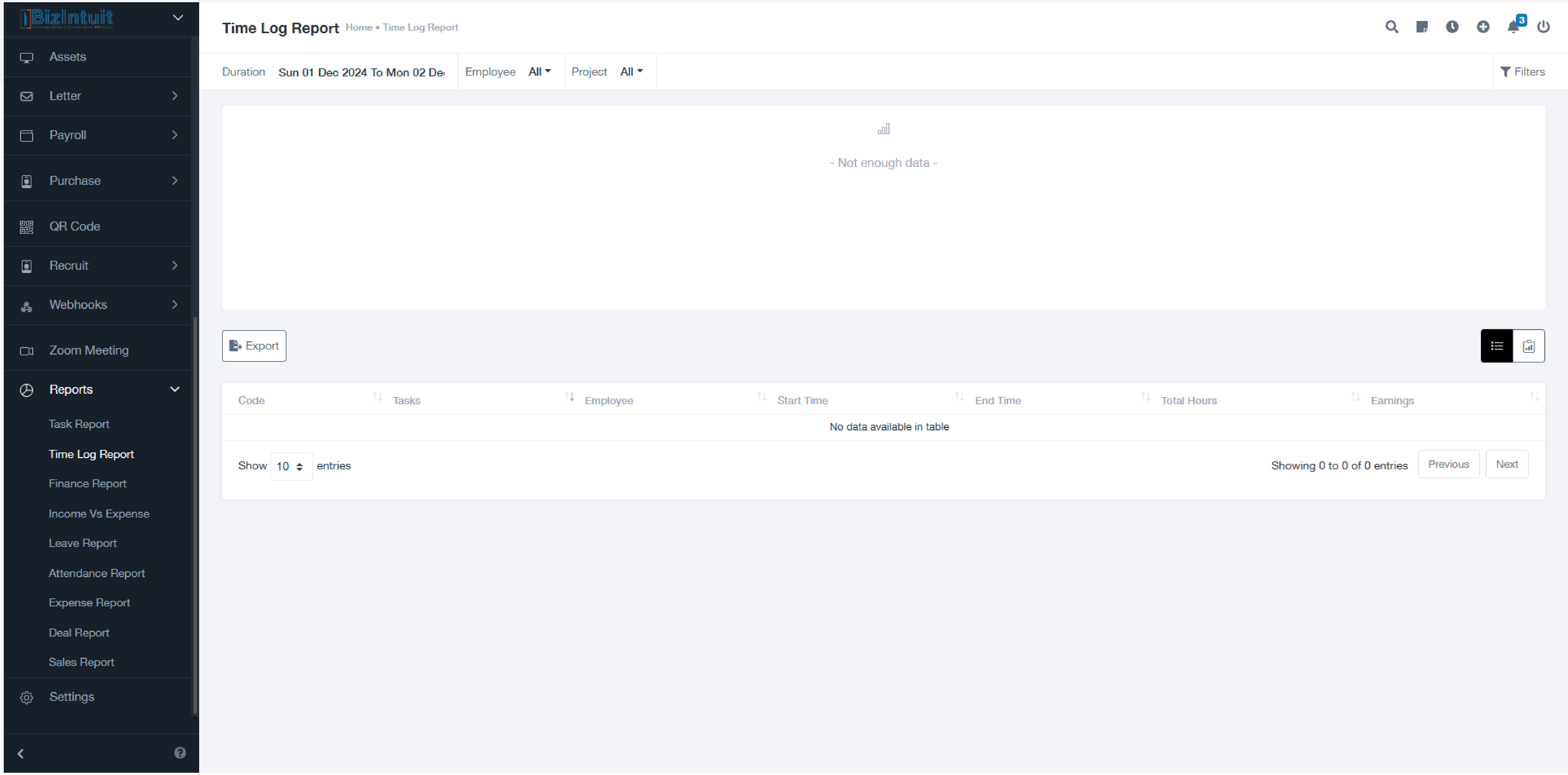
Time Report

You can generate and manage task reports, providing insights into task progress, deadlines, and completion statuses.



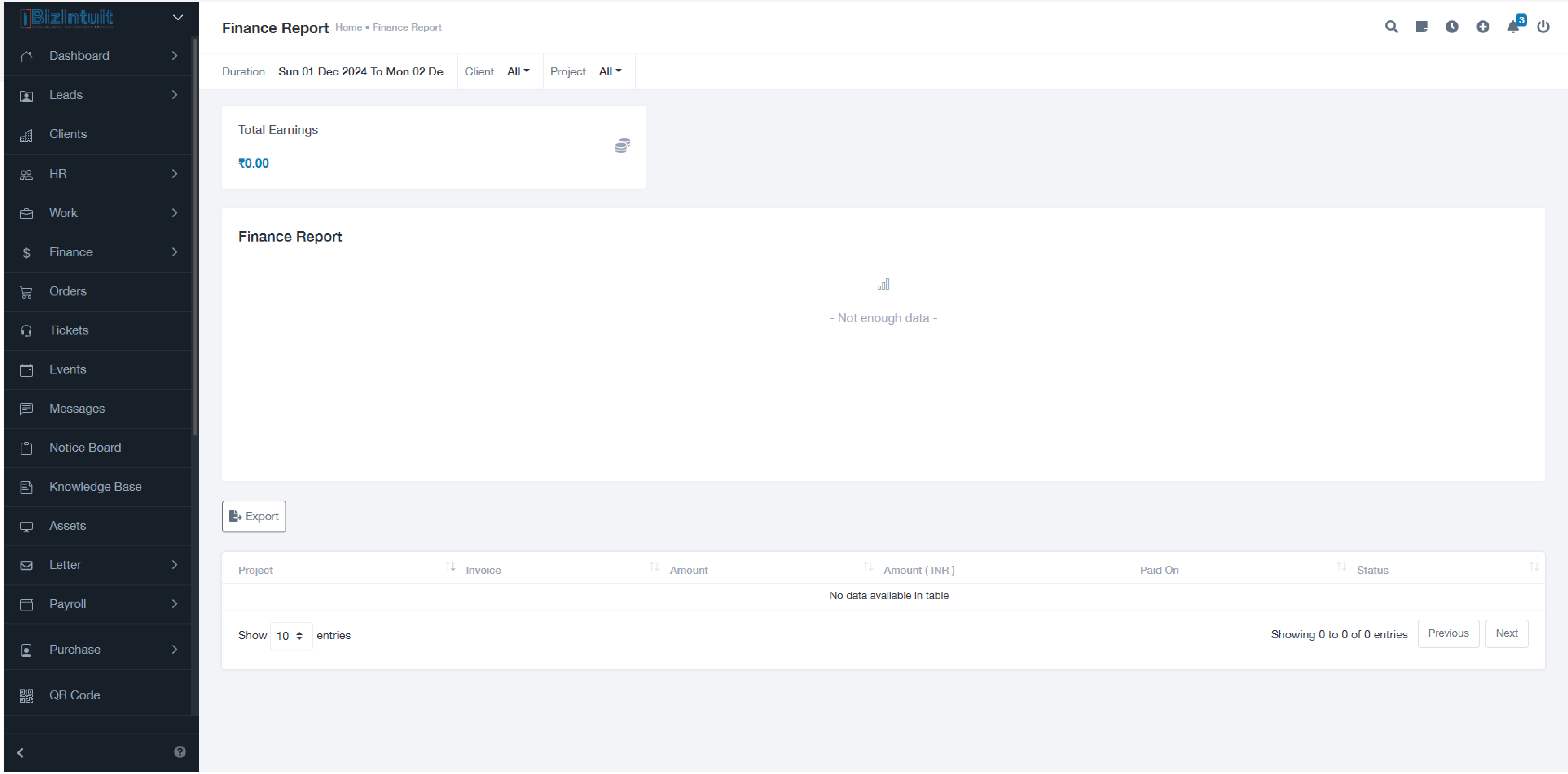
Time Log Report

Detailed tracking of work hours and time entries for employees.



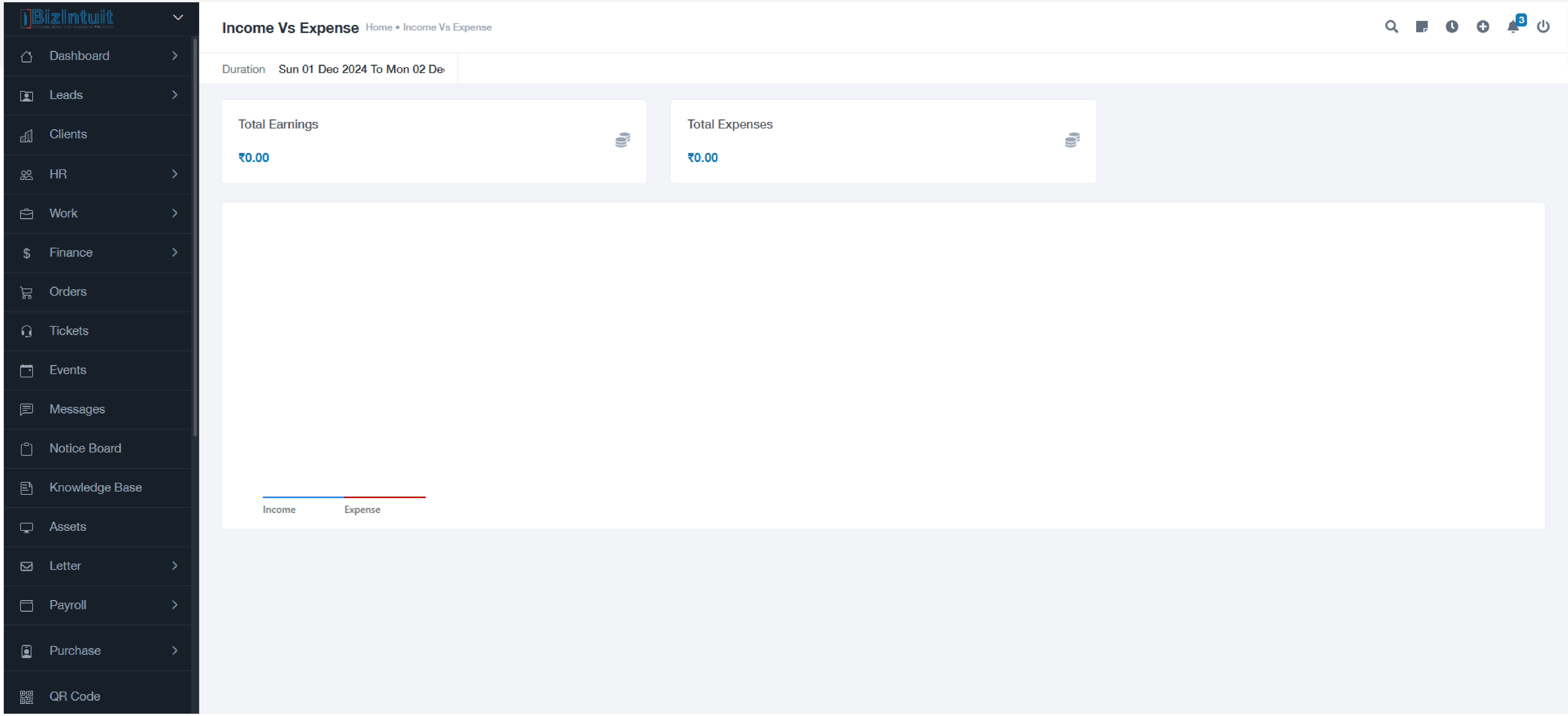
Finance Report

Financial overview, including income, expenses, and profit analysis.



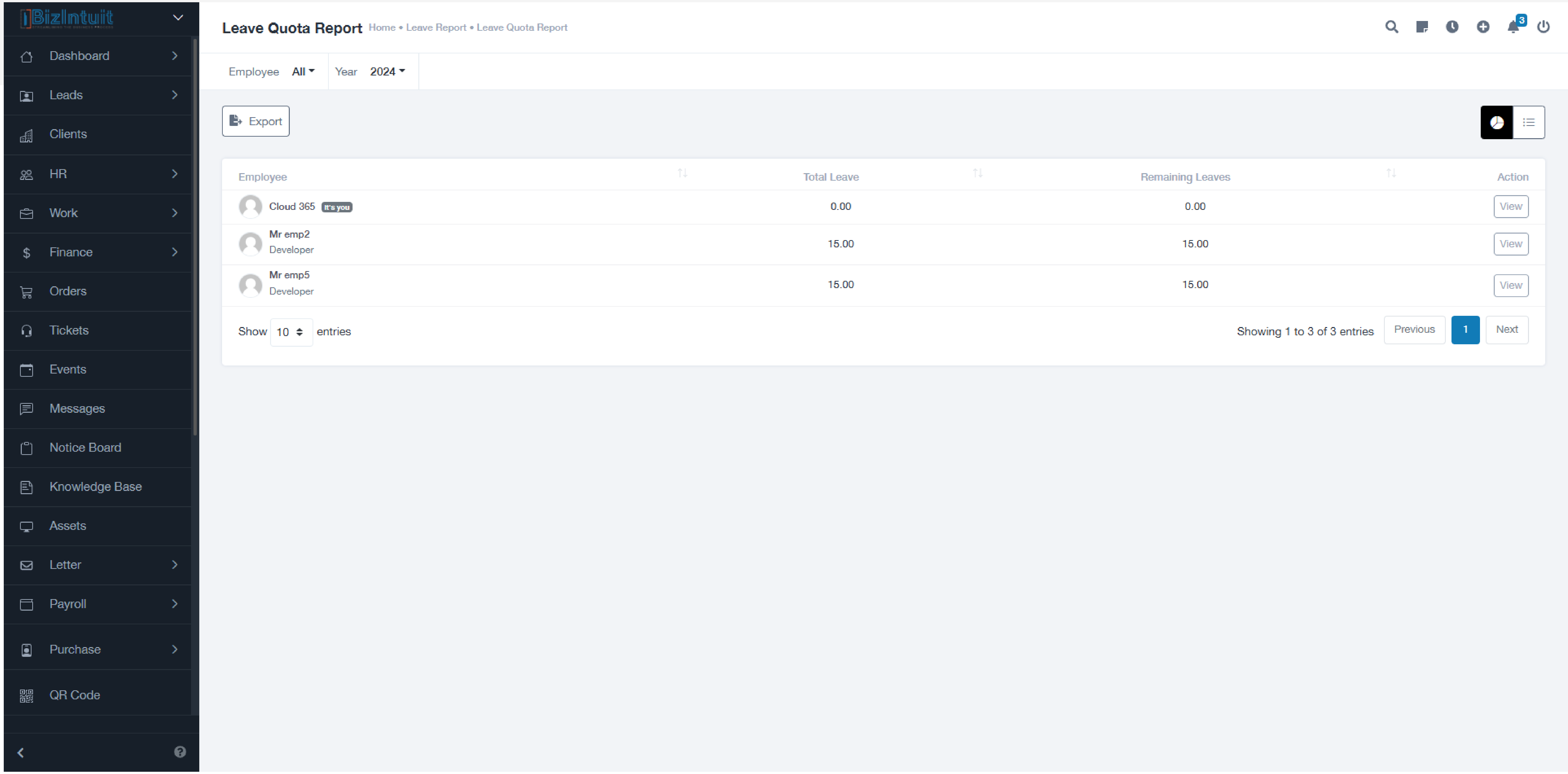
Income Vs Expense

Comparison of income and expenses to assess financial health.



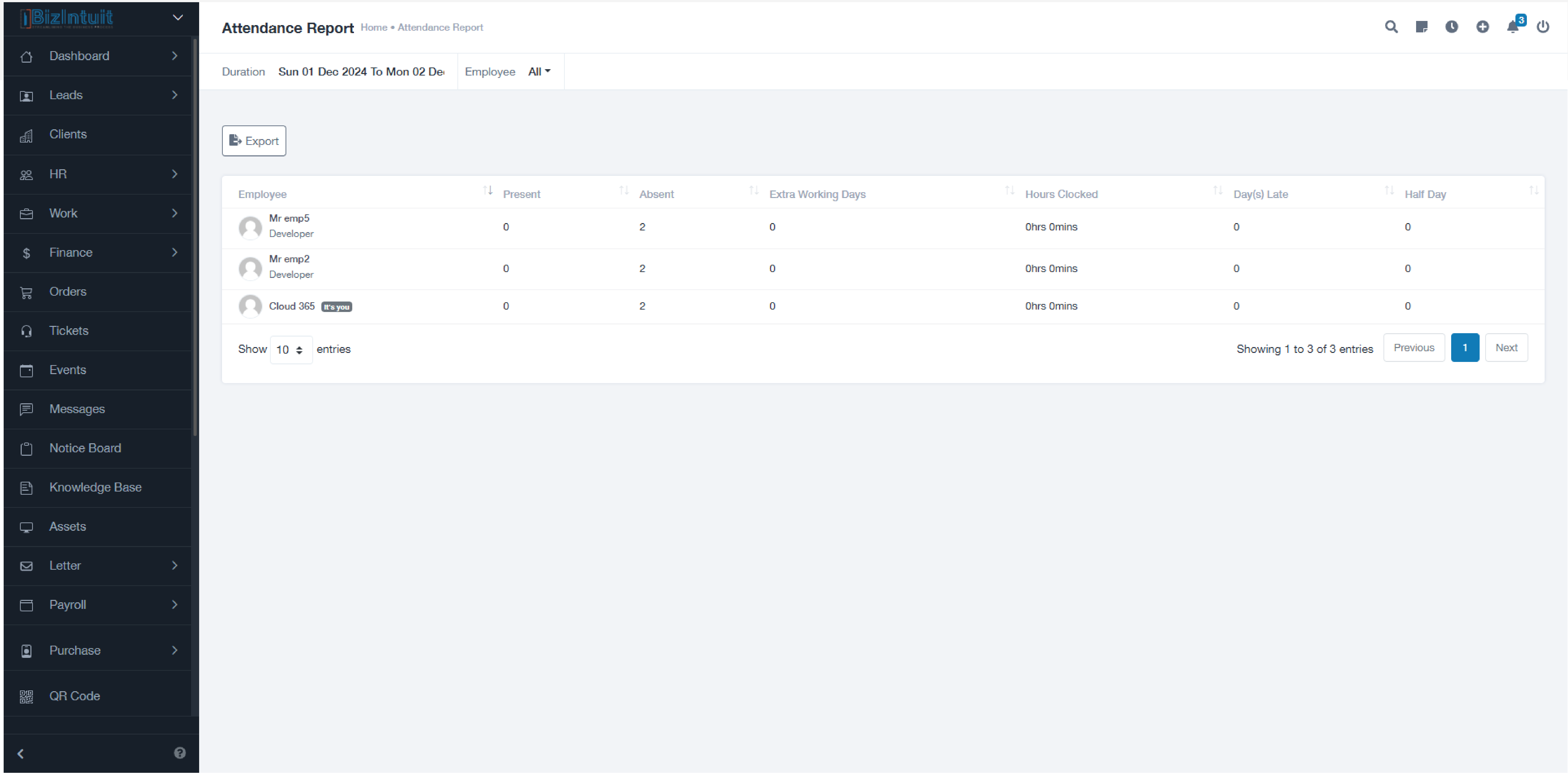
Leave Quota Report

Records of employee leave, including types of leave and duration.



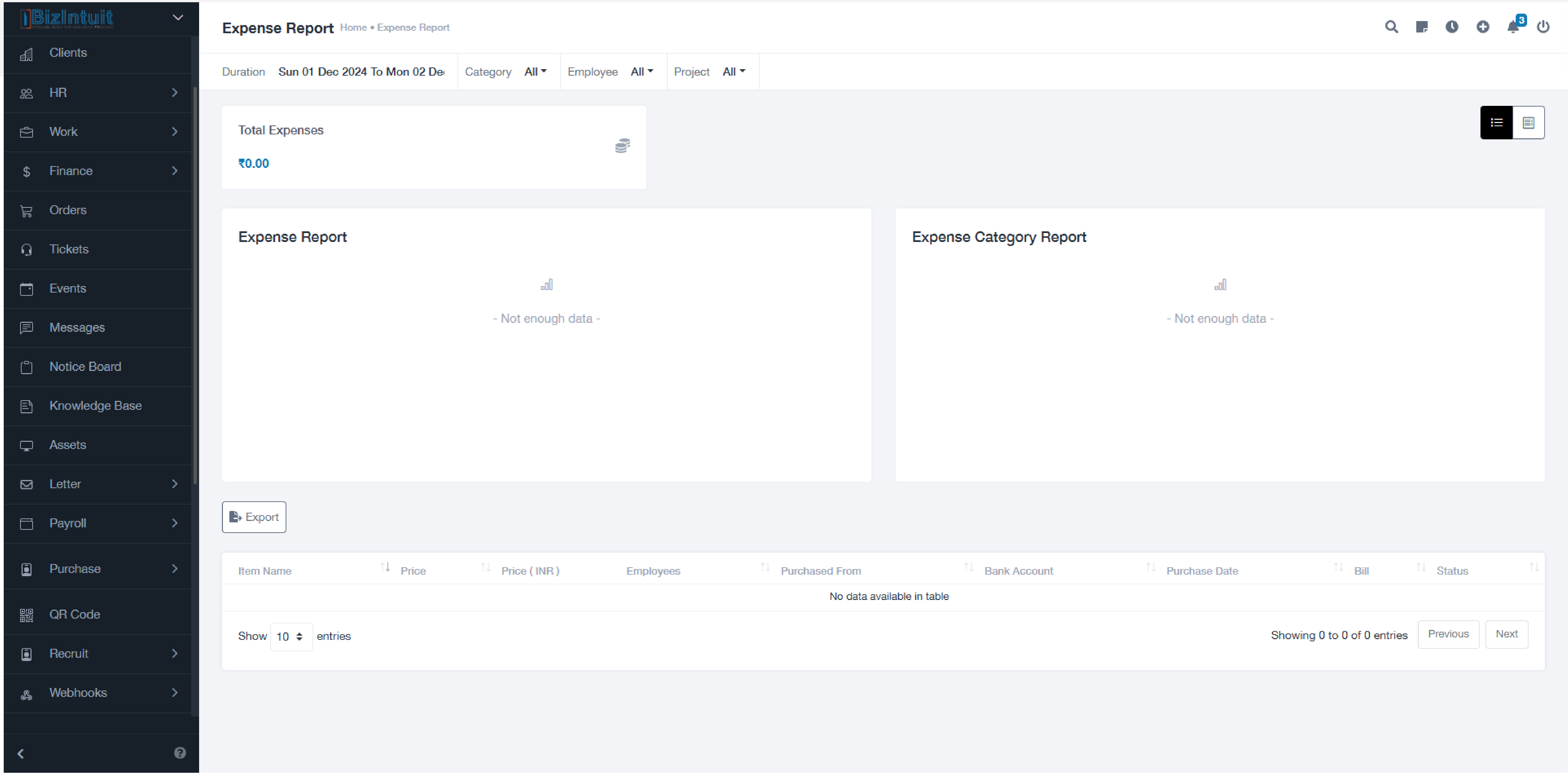
Attendance Report

Detailed report on employee attendance, absences, and working hours.



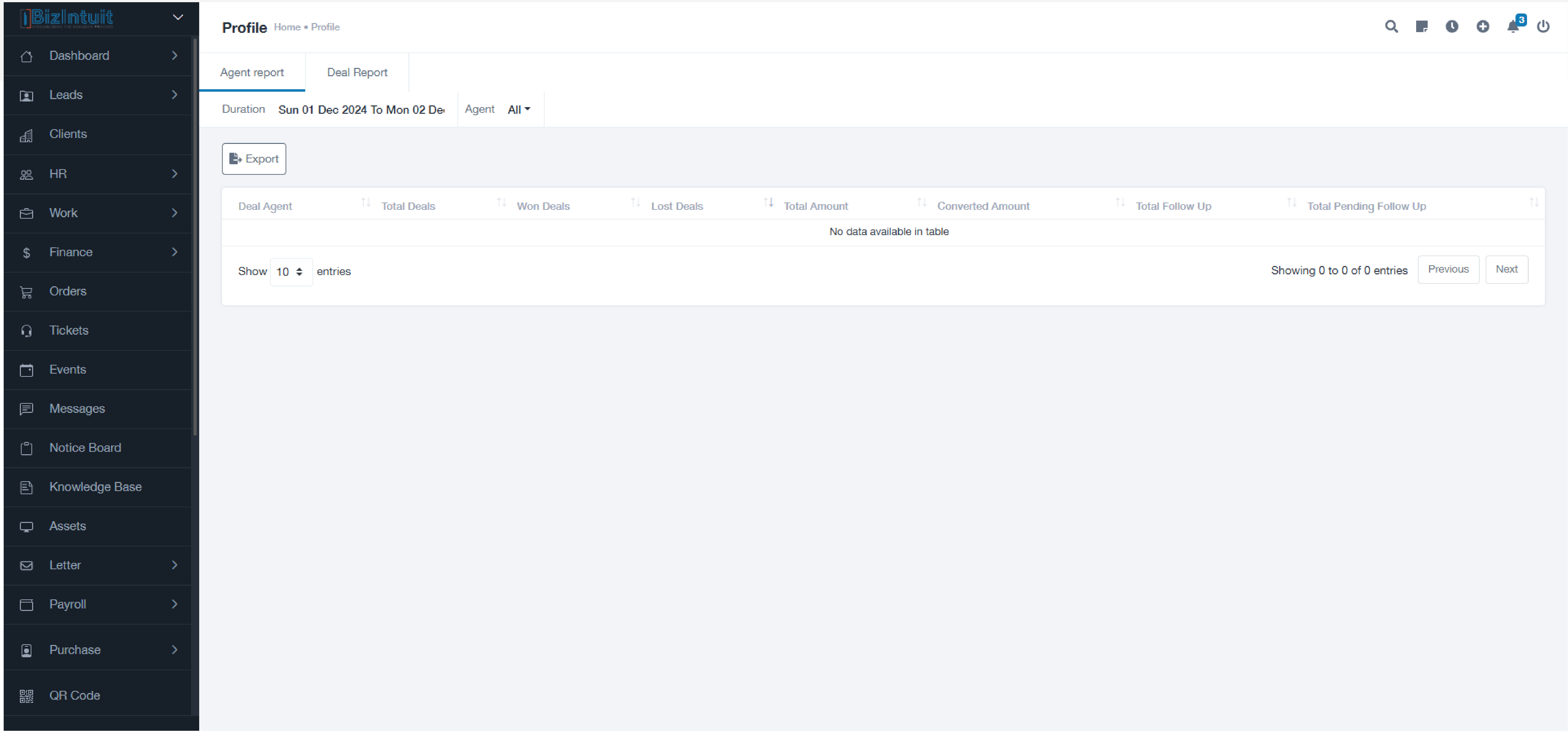
Expense Report

Overview of company expenses, categorized and summarized.



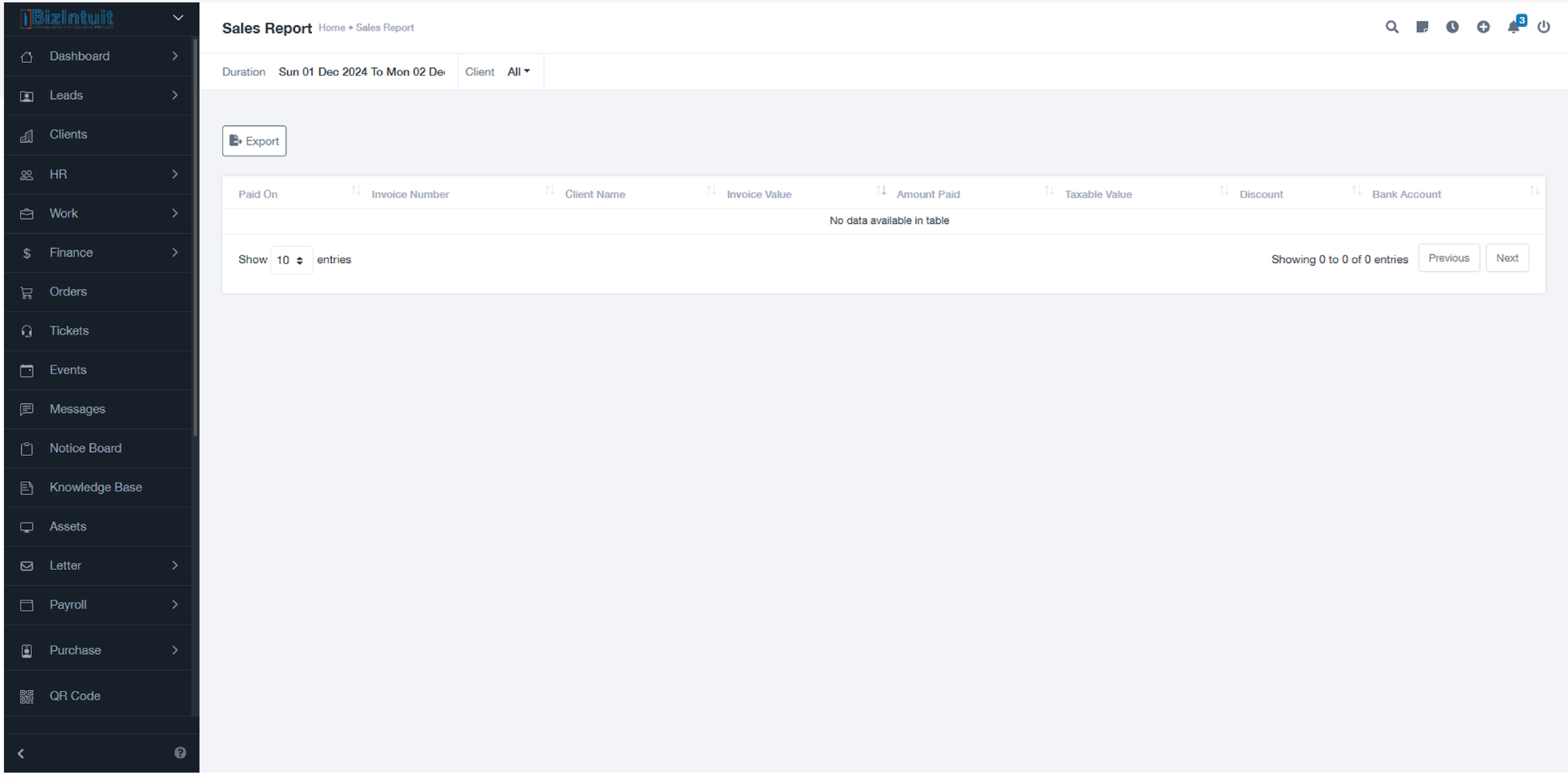
Deal Report

Tracking of sales deals, their status, and outcomes.



Sales Report:

Overview of sales performance, including revenue, target achievements, and trends.



Company Settings

- Company name, logo, and contact information.
- Business address and tax-related details.
- Default currency, time zone, and language preferences.
- Customization of templates for invoices, contracts, and reports.
- User permissions and role management for employees and administrators.
- Integration settings with third-party tools or platforms.